

College Admissions & Financial Aid Services

THE CFS CLIENT CARE CENTER is a premier college admissions and financial aid service, available exclusively through your financial advisor. Three levels of service to choose from, to help your family successfully navigate through the maze and minefield of college admissions and financial aid and to help you achieve an overall best outcome for your student and your family's finances!

SERVICES PROVIDED

	Premier Plus	Premier	Standard
Do What You Are personality assessment --- identifies career paths and majors	✓	✓	
Do What You Are results review (learning style; majors; learning, upcoming assessments)	✓	✓	
ACT/SAT evaluation - Assessment to determine whether the SAT or the ACT is the best test to prep for testGear online self-study SMART Curriculum (if applicable) After taking the testGear BrainScan a personalized test prep course is created for those who prefer self-study	✓	✓	
Career Video assignments --- The completed Do What You Are assessment provides short videos and detailed career information	✓	✓	
Writing sample evaluated ----Essays provide the college an insight into the way a student thinks. The coach needs to know this in advance	✓		
Resume Instruction --- This is referred to as a Brag Sheet. Student and parent help create a shining example of what the student has accomplished outside the classroom	✓		
Brag Sheet (maximum three drafts) --- Fine tuning is essential to produce a concise yet powerful resume of the students' accomplishments	✓		
College Web Site Research Instruction --- Students learn how to get the most out of their web research	✓	†	
Letters of Recommendations meeting -- Strategies to help the recommender with a letter that shows off the student in the best light	✓		
Winning Essay Reading Assignments --- Students read and comment on essays that demonstrate what kinds of essays work and why	✓	TT	
Essay Components Tutorial (live) --- There are three necessary parts to an essay. Students must learn these to write a winning essay	✓		
Compile List of Colleges with Institutional Scholarships --- Student will be provided a targeted list of colleges based on academics, social environment and merit and need-based financial aid	✓	✓	
Common Application Essay Prompts Review: Discussion of which essay prompt(s) are best for the student to write about	✓		
Common App Review: There are multiple sections to the Common Application. Over 500 colleges use this form and many colleges have their own supplemental admissions applications	✓		
Brainstorm Session of Essay Prompts: Brainstorming essay ideas --- --- The choice of prompt is just the first step. Ideas on content and approach are discussed	✓		
Essay Editing: Essay drafts edited (maximum three drafts each) --- includes personal statements	✓		
College Interview Prep: (if necessary) "How to Present Your Best Self"	✓		
Personal College Family Web Account: Parents can see in real time what's been completed and what remains to be completed	✓	✓	✓
Review of family information for accuracy	✓	✓	✓
Obtain Federal Student Aid usernames and passwords: Used to sign the FAFSA and access all the Dept. of Education web sites	✓	✓	✓
College Aid Requirements: Colleges use different forms and have varying financial aid deadlines. Parents can view all the requirements in one place	✓	✓	✓
Filing of the FAFSA: The instructions for filing the FAFSA are often very confusing. This form will be completed with 100% accuracy (based on the family's approval of their information)	✓	✓	✓
Filing of the CSS/Profile® (if required): This form requires much more information than the FAFSA does. Instructions can be especially challenging and confusing to answer correctly and in the family's favor. Based on family's approval of their information, this form will be completed with 100% accuracy. Extra charges do apply: \$16 registration fee and \$9 per college payable to the College Board *	✓	✓	✓
Tax Update: The first filing of the FAFSA is based on estimates. Completed tax return information will be used to update the FAFSA	✓	✓	✓
Merit Based Financial Aid Appeal: Parents will be provided sample letters of appeal to send to the college	✓	✓	✓
Financial Aid Award Evaluation: We will determine if the student was awarded fairly by the college	✓	✓	✓
IRS Data Retrieval Tool or IRS DRT: Many colleges require that the family verify their tax information by using the IRS DRT. However it doesn't always function correctly which can be very frustrating. This will be done automatically for the family	✓	✓	✓
Financial Aid Award and Student/Parent Loan Teleconferences: Parents learn about how the awards are constructed and the benefits and burdens of student and parent loans	✓	✓	✓
Need Based Financial Aid Appeal Service: Only included as part of the Premier and Premier Plus levels	✓	✓	
SERVICE FEE	\$	\$	\$

* Students applying to institutions requiring the CSS/Profile may have additional forms that are required based on their circumstances and therefore outside the scope of this basic filing service. See the engagement agreement for details and fees for these additional filing services.

† self-study TT Essays sent for reading – no follow up