

The College
Strategy Evaluation

Investigation

3

4



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Confidential Understanding

Exploration

Implementation

Monitoring

Whether through one of our informative workshops, an online webinar, our website, social media, or by being referred by a friend, we want you to fully understand our process and the ways in which we are helping families—probably a lot like yours—save and pay for their children's education.

The first step is to understand the "rules of the game" when it comes to college funding. By understanding the standardized forms such as the FAFSA and CSS Profile. understanding the timeline and the types of strategies that are being used to save and pay for college, it gives us a great first step towards accomplishing the goal of paying for higher education...and still retiring one day!

Our process is designed for you to work one-on-one with one of our trusted advisors who will really get to know you and understand your children, your goals and what makes you tick—not just in terms of the singular goal of paying for college; but how that relates to the rest of your financial world.

By exploring various financial strategies and how they can improve your financial circumstances and the advantages and disadvantages of each option, we are able to determine the type of strategies that will help to accomplish your goals.

By going to the financial markets, negotiating on your behalf and selecting institutions with whom to work to customize your plan, we can bring these strategies to life. Our team manages the entire process on your behalf and helps you to position your newly implemented strategies into your existing planning.

Through our ongoing client service model, we help clients monitor changes in the capital markets, tax law changes, changes in the cost of college, and even familial changes so that your strategic planning evolves with you.



For most families, they are torn between saving for college or saving for retirement.



Find an Advisor near you on our website!

It doesn't have to be that way! The College Funding Coach® was created in 2002 to help families navigate the maze of paying for college and making the college dream a reality...and still retiring one day.

What began in 2002 with a single financial advisor on a mission to help educate parents in the Washington, D.C. area with strategies for saving and paying for college has grown into a national team of nearly 100 advisors spread across the country. We help families better understand the complex strategies for saving and paying for college and making higher education more affordable.

We partner with schools, businesses, churches, synagogues and community organizations to conduct several hundred workshops each year. Our interactive workshop, **Little-Known Secrets of Paying for College** teaches parents the rules of the game when it comes to financial aid, as well as the critical strategies to help them win that game—whether by qualifying for need-based aid or by maximizing cash flow and liquidity.

As you can imagine, the stock market has gone up and it's gone down. Taxes have gone up and they've gone down. Unemployment has increased and then it decreased. But two things have remained constant: every year, approximately 20 million high school students head off to college^[1], and since 2000, the cost of tuition and fees at American colleges has more than tripled the rate of inflation^[2].

We help the families with whom we work understand the process and incorporate college planning into the broader context of their financial plans—from risk management to investing, estate planning and tax management. By taking a comprehensive view of a family's finances, we are often able to correct inefficiencies and capture dollars that can be redeployed towards paying for college. Our approach helps parents reduce their out-of-pocket expenses and balance the challenge (and the stress) of saving for college and retirement simultaneously.

Whether you'd like to schedule a workshop at your school or meet individually with one of our advisors or just find great resources and information about the college process, you've come to the right spot. Through our collective knowledge and the terrific resources we have curated, we hope to be your one-stop shop for the college journey. We look forward to working together!

¹ National Center for Education Statistics—Digest of Education Statistics Table 105.30: https://ncesed.gov/programs/digest/d17/tables/dt17_105.30.asp

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