



Comprehensive Programs - Scope of Services, Terms and Conditions

Scope of Services

Our comprehensive programs are typically delivered by a team of specialists who focus on academic fit, personality fit, and affordability. Each family engagement is personalized to serve your unique circumstances. Below is the minimum scope of services you can expect from each of our comprehensive packages:

Admissions Advisor (Package 1, 2, 3)

- Implement Milestones to College™ Project Plan
- Onboard student to College Planner Pro website
- Discuss standardized tests – arrange for diagnostic SAT/ACT if required
- Review high school transcript for grades and curriculum strength
- Brainstorm extracurricular activities
- Calculate College Admissions Profile Index (CAP) to assess student’s competitive position
- Finalize student criteria
- Identify up to 25 colleges for student to research
- Arrive at final list of 6-8 colleges
- Prepare for college visits and interviews
- Review “demonstrated interest”
- Review personal statement and all essays
- Review Common Application and supplemental essays

Personal Fit Assessment Specialist (Package 1,2 & Single Purchase)

- Reduce the stress of the college search process
- Understand your individual learning style
- Discover your natural strengths and talents
- Gain confidence in your college direction
- Identify best-fit career options and college majors
- Administer three professional assessments and provide interpretation

Affordability Expert (Package 1,4)

- Engage client in discovery (data collection) process via online portal
- Provide access to college aid pro website
- Provide detailed aid eligibility analysis with financial aid and scholarship projections
- Discuss preliminary eligibility for college-awarded scholarships
- Determine, if any, financial boundaries for college selection
- Design college funding plan
- Calculate EFC (Expected family Contribution) for FAFSA and CSS Profile
- Assist with preparation and submission of FAFSA and CSS Profile
- Review financial awards (as appropriate) and clarify family financial obligations to the college
- Provide financial forms oversight during the college years
- Initiate appeals process when merited

What You Can Expect From Us

- Be accessible to both you and your student in accordance with the scope and terms described in this agreement USEP
- Assist with defining tasks, plans, and schedules in support of college selection, application, and financial strategies
- Advise and assist you and your student to prepare for direct interaction with college officials, faculty, and/or coaches
- Provide quality information and professional advice consistent with the services described in this agreement
- Maintain your financial privacy

USEP

What We Expect of You

- Submit timely, accurate, and complete information as needed to support meetings, milestone events, and deadlines
- Maintain the confidentiality of copyrighted documents received (i.e., do not share information with any third parties)
- Provide timely disclosure of disabilities, counseling, medical, or legal circumstances which may impact our advice
- Interact directly with college officials to resolve student/family-specific issues regarding admission and financial aid

- Submit admissions and financial aid applications, and standardized test score reports to the appropriate parties and pay associated fees
- Advise us of any changes in address, phone numbers, email addresses, or applicable payment information

Warranties, Service Limitations, and Confidentiality

We do not guarantee admission to any college or university, nor can we guarantee college funding from any source. We do not provide legal, tax or investment advice. We do not assist with seeking third party (private, non-college) scholarships. Contact your high school guidance office for third-party scholarship sources and information. Absent very unusual family circumstances and without a specific power of attorney, we cannot interact with college officials directly on your or your student's behalf.

Meetings and Other Interactions

Meetings are typically conducted using Zoom's online conferencing technology. They are scheduled according to when you begin the program. Meeting intervals will vary but conform to the Milestones Project Plan. This will allow ample time to complete assigned tasks. Unlimited email support is provided with this agreement. We encourage you and your student to use this resource to supplement meetings.

Cost of Services & Payment Terms

The total cost of services is specified on the website product page. If extended payments are requested, an initial deposit is required, followed by 5 - 10 monthly payments. Total cost of services for clients using extended payment includes a service charge of \$250.00 - \$350.00. Acceptable forms of payment are all major credit cards and Venmo.

Term of Agreement, Cancellation, and Refund Policy

This agreement may be canceled at any time, by either party with notice by email to your SFC advisor. If you cancel the agreement within five business days of the date payment is submitted, a refund of any payment less \$250 will be issued. If you cancel the agreement after five business days of the date payment is submitted, a refund of your payment less \$250, less an additional \$250 per hour for any work initiated will be issued at our discretion.

Privacy Policy

We will always protect your right to privacy. By "you" or "your," we mean your entire family and any information that is disclosed to us as part of this engagement. We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization. We do not disclose any nonpublic personal information obtained through our engagement except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees and consultants who use this information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared. We retain physical and digital records relating to the professional services that have been provided and the fees you have paid. We also maintain physical, electronic, and procedural security safeguards to protect these records. Records relating to the services provided are destroyed upon your request or three years after the completion of our engagement.