



## **Custom Services: General Terms and Conditions, Privacy Policy, More**

Depending upon your choice of services, you will be interacting with one or more specialists who focus on academic fit, personality fit, and affordability.

### **What You Can Expect From Us**

- Be accessible to both you and your student in accordance with the scope of services described on the Custom Services Page
- 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



### **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, 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 has been determined in your interaction with our onboarding coordinator. This amount is paid upon enrollment. Acceptable forms of payment are all major credit cards, PayPal and Venmo. We cannot invoice private individuals.

### **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 a \$350 document fee will be issued. If you cancel the agreement after five business days of the date payment is submitted, a refund of your payment less a \$350 document fee, less an additional \$250 per hour for any work initiated by our team will be issued. This agreement ends when the scope of services has been completed and you are notified by your SFC Advisor.

### **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.

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