



Scope of Services, Terms and Conditions

Our services are typically delivered by a specialist or a team of specialists. Each specialist is an expert in his or her respective content area. Currently, our services are offered in “packages” at fixed fees as follows:

- Package 1 (Comprehensive Services Package) includes specialists in each area listed below
- Package 2 (Admissions & Assessments) includes an Admissions Specialist and a Personality & Career Assessment Specialist
- Package 3 (Admissions Services) includes an Admissions Specialist
- Package 4 (College Funding Services Package) includes an Affordability – College Funding Specialist
- Package 5 (Personality & Career Assessments Package) includes a Personality & Career Assessment Specialist
- Package 6 (Test Prep Package) includes a Test Prep Specialist for ACT and SAT
- Package 7 (College List Validation) includes an Admissions Specialist providing limited scope
- Package 8 (College List Validation) includes an Admissions Specialist providing limited scope
- Package 9 (Senior Crush Advisory Package)

Below is the **typical scope of services** you can expect from our Specialists in each area. Please note that Packages 7,8 and 9 are available only to high school seniors and typical scope will be limited.

Admissions Specialist (Included in 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 (optional, but highly recommended)
- 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

Personality & Career Assessment Specialist (Included in Package 1,2 & Single Purchase)

- Administer three professional assessments and provide interpretation
- Explain student’s learning style
- Explore natural strengths and talents
- Demonstrate how personality profile impacts communication, career fields and more
- Integrate major and career exploration into college search (if included in Package 1,2)
- Identify best-fit college majors and corresponding career fields (if included in Package 1,2)

Affordability – College Funding Specialist (Included in 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 merit scholarship projections
- Discuss preliminary eligibility for college-awarded scholarships based on student CAP Index score
- Determine, if any, financial boundaries for college selection
- Design college funding plan
- Calculate SAI (Student Aid Index) FAFSA
- Calculate EFC (Expected Family Contribution) 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
- Initiate appeals process when merited
- Provide Annual Review of financial forms during the college years

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
- 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 the Intake Form for your specific services immediately after making your payment
- Submit timely, accurate, and complete information as requested 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 for what you have selected 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 between \$150 - \$350. Payment is accepted via all major credit cards and PayPal. Some of our services are not available to be financed.

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.

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.

Revised September 27, 2022