

Parent/Sponsor Specific Tuition Rewards

Transferable to any family member

Consultation, Event, Workshop, Webinar	500
Enrollment and account activation.....	500
Annual Review (each year = 500).....	500
Referrals (up to 6 @ 500).....	500-3,000
Long Term Care Policy or LTC ABR on life policy	1,500
Disability Policy or ABR on Life Policy	1,500
Customized College Funding Plan	2,000
College Planning Tutorial Program For Parents	4,000
Existing permanent life insurance	4,000
Annual renewal points.....	2,000
New permanent life insurance	4,000
Annual renewal points.....	2,000
Assets Under Management	5% Yr.
PA 529 Accounts	10% Yr.
Medicare Advantage Policy	1,500
Medicare Supplement Policy	1,500

Student Specific Tuition Rewards – Non-transferrable

Birthdays	
Age 1-11	500-5,000
Age 12-14	750-2,250
Age 15-17	1,000-3,000
SAGE FASTTrack Profile end of 9th grade.....	9,000
SAGE FASTTrack Profile end of 10th grade.....	9,000
SAGE FASTTrack Profile end of 11th grade.....	9,000

Notes:

- Existing and new policies are limited to one per person, two per household.
- AUM include stocks, bonds, mutual funds, CDs, money market funds, etc. AUM does not include cash value of life policies and PA 529 assets.

- College Planning Tutorial provided by SFC Learning center. SFCLearningcenter.com
- Online calculations of potential Tuition Rewards can be completed at: strategiesforcollege.com/sageulator

