

# College Planning Service America, LLC

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*"Experts in College Financial Planning"*

## Welcome Aboard!

**Our Mission:** *College Planning Service America's mission is to provide the most timely information regarding the college admission and financial aid process so that families are able to choose the best college for their students and maximize the financial aid they are entitled to receive.*

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### **Contact Information:**

#### **Client Office Address:**

P.O. Box 39574

Philadelphia, Pa 19136

**Office Phone:** 610-726-1146

**Toll-free:** 888-628-8333

**Office Fax:** 610-726-1147

**Email:** [kevin@cpsamerica.net](mailto:kevin@cpsamerica.net)

**Website:** [www.cpsamerica.net](http://www.cpsamerica.net)

## Services Provided:

- ✓ "It's All ABOUT U" – Admissions Seminar
- ✓ Create student resume, discuss potential majors, develop school list (if applicable)
- ✓ Review common and coalition applications
- ✓ Set up of Federal & State financial aid accounts
- ✓ Recommendations on enhancing financial aid eligibility
- ✓ Complete all financial aid forms – FAFSA, CSS Profile, Institutional Forms, State grant forms, Federal, state & school verifications. Review with parents. Parents submit forms.
- ✓ Review of Financial Aid Award letters
- ✓ Appeal of financial aid awards if warranted
- ✓ Federal Tax submission Using IRS Data Retrieval Tool
- ✓ Review financing options
- ✓ Complete all Federal loans (PLUS & Stafford), School Loan Request forms

## Primary Directive:

*THE PRIMARY MEANS OF COMMUNICATION BETWEEN COLLEGE PLANNING ADVISORS LLC & YOUR FAMILY  
WILL BE EMAIL!*

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College Planning Service America is a third party in the financial aid process. Federal/State agencies & colleges will communicate directly with the Parents/Students. All information must be forwarded to College Planning Service America in a timely manner so that we can complete requests for information being made to the family.

**IT IS IMPERATIVE THAT PARENTS/STUDENTS CHECK THEIR EMAILS DAILY AND FORWARD ALL INFORMATION TO US IMMEDIATELY!**

College Planning Service America LLC emails will include important information which we need to complete your financial aid forms in a timely manner. Remember, this entire process is DEADLINE sensitive. It is extremely important that we have:

- Your Email account information & inform us immediately if it has been changed
- Your emails are checked daily for our communications
- You receive & read our quarterly newsletter which will contain the most up-to-date information throughout the whole financial aid process
- You insure our emails are not "spammed" by your computer

\_\_\_\_\_ **Client Initials**

### **Forms & Procedures:**

Timeline of process & glossary of terms relating to the timeline have been reviewed with the client. College Planning Service America LLC will prepare & review the various financial aid forms required by the various Federal & State agencies as well as the colleges that have been applied to. These forms will be prepared from the information that has been supplied by me/us. Information that is supplied by me/us is accurate & up-to-date & shall be used for completion of any financial aid forms. All information will be handled as confidential & will not be divulged to anyone without prior written consent by the client. College Planning Services America LLC will do it's best to maximize the family's financial aid eligibility but cannot guarantee any specific results.

\_\_\_\_\_ **Client Initials**

\_\_\_\_\_ **Student Initials**

### **Financial Aid Award Letters:**

Financial aid award letters are issued from each school to which the student is applying. These awards must be forwarded to College Planning Service America LLC immediately upon receipt.

\_\_\_\_\_ **Client Initials**

### **Authorization to Receive Credit Information:**

I/We hereby grant the necessary authority to College Planning Service America LLC to acquire/receive any credit information deemed necessary to fulfill their obligations. This information will be used only to assist in the procurement of merit and/or need-based financial aid.

\_\_\_\_\_ **Client Initials**

### **Confidential Release of Information:**

In accordance with *The Buckley Amendment*, the student, upon their 18<sup>th</sup> birthday, is considered to be the primary contact regarding communication from the college/university & the various government agencies. I agree to provide information concerning my student accounts & financial aid status & forms to College Planning Service America as long as my family is contracted with them to provide their services to us.

\_\_\_\_\_ **Client Initials**

\_\_\_\_\_ **Student Initials**

### **Divorced/Separated Parents:**

In the event that parents are divorced or separated, the Client will be the person signing this agreement & **NO INFORMATION** will be shared with the other spouse unless authorized below. It will be the family's obligation to communicate information among them as they deem necessary.

\_\_\_\_\_ **Authorize Release of Information** \_\_\_\_\_ **Do Not Authorize Release of Information**

### **Federal Taxes:**

Client must provide a signed copy of the Parental and/or Student Federal tax forms which must be signed & include ALL W-2's and/or 1099's on an annual basis. Your FAFSA will be submitted on the prior-prior year's taxes.

**EXAMPLE:** 2019-20 FAFSA uses 2017 Federal Taxes

2020-21 FAFSA uses 2018 Federal Taxes

2021-22 FAFSA uses 2019 Federal Taxes

Failure to submit the current year's tax documents could result in the loss of financial aid.

\_\_\_\_\_ **Client Initials**

### **Appointments/Telephone Calls:**

All client appointments will be confirmed via email. If you do not receive an email confirmation within 24 hours of scheduling your appointment, contact the office. If you need to cancel/reschedule an appointment, let us know in a timely manner so that we can service other clients. Telephone calls will be responded to within 24 hours of a message being received. During peak times, this may be extended.

\_\_\_\_\_ **Client Initials**

### **Faxes:**

Faxes can be received 24 hours a day. Use fax or email to forward any & all correspondence received by the Parent(s) and/or Student(s) for more efficient service in a timely manner.

\_\_\_\_\_ **Client Initials**

\_\_\_\_\_ **Student Initials**

### **Transferring of Services:**

This contract is non-transferrable & is solely between College Planning Service America LLC & the Client.

\_\_\_\_\_ **Client Initials**

### **Cancellation/Refund/Collection Policy:**

Any request for the cancellation of our services for any reason beyond the three (3) day right of rescission will be at the sole discretion of College Planning Service America LLC. Refunds will be issued within 10 business days. The use of a collection agency will be used to satisfy any unsatisfied debt.

\_\_\_\_\_ **Client Initials**



# College Planning Service America, LLC

## Payment Agreement

The \_\_\_\_\_ Family

If accepted by College Planning Service America LLC, agrees to make the following payment for

\_\_\_\_\_ 's 20\_\_\_\_ - 20\_\_\_\_ Academic Year.

BASIC Service Package: \$595

ENHANCED Service Package: \$695

PREMIUM Service Package: \$895

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- Payment in full of the College Planning Service America LLC fee must be made before the submission of any financial aid forms can occur.
  - All processing fees (CSS Profile) beyond the College Planning Service America LLC fee must be paid before the submission of those financial aid forms can occur.
  - Returned checks will be subject to a \$35.00 service fee.

**Agreed to and accepted by**

the \_\_\_\_\_ Family

**& College Planning Service America LLC.**

\_\_\_\_\_  
College Planning Service America LLC Representative

\_\_\_\_\_  
Date

\_\_\_\_\_  
Client

\_\_\_\_\_  
Date