

COLLEGE PLANNING SERVICE AMERICA LLC

RENEWAL AGREEMENT (FOR RETURNING CLIENTS ONLY)

College Planning Service America LLC, (hereinafter referred to as CPSA) and

_____, (hereafter referred to as the CLIENT) mutually agree to the following:

TERM of AGREEMENT (covers the academic year 2024-25).

This agreement will begin immediately upon acceptance by Dr. Kevin Bukatman, of CPSA, and will terminate on August 31, 2025. This agreement serves as the only document between the parties, replacing and superseding any prior agreements. **** No student accounts will be processed until service agreement and payments have been received. ****

FILING of FINANCIAL AID FORMS

CPSA will complete and file the required Financial Aid Forms that are applicable to the Federal, State, and Institutional financial aid process.

CLIENT's RESPONSIBILITY to PROVIDE INFORMATION to CPSA

The Client is responsible for providing all information so that CPSA can complete and file the Financial Aid Forms. This information must be received at least three (3) weeks prior to their due date at CPSA's Administrative Office. The Client is responsible for providing a complete and signed copy of all 2020 Federal Tax Returns including all schedules, W-2's, and/or 1099s as well as all asset related year end statements to CPSA by October 1, 2024.

CONFIDENTIALITY of INFORMATION

Information provided by the Client will be regarded as confidential and CPSA will not divulge any information to anyone without the prior written consent of the Client.

ACCURACY of INFORMATION PROVIDED by THE CLIENT

The client agrees that CPSA cannot guarantee or warrant, expressly or implied, the accuracy or thoroughness of the information provided by the Client. The client is responsible for notifying CPSA immediately upon receipt and review of the Federal Student Aid Report (SAR) for content corrections and additions.

CLIENT SERVICE FEE

\$250 (if paid before September 30, 2023)

\$350 (if paid after October 1, 2023)

PROCESSING FEES

Certain financial aid forms and/or loan applications require a processing fee. These fees are in addition to CPSA's renewal fee and/or any other costs or charges incurred by CPSA on behalf of the Client. In the event correspondence, financial aid forms or any other documents are required to be sent by any delivery service other than normal first-class mail through the U.S. Postal System, these delivery costs will be billed to the Client at cost.

BORROWING INTENTIONS

Please check any borrowing intentions for this academic year:

(A delay in processing can occur if we do not have your borrowing intentions in time)

- Stafford Loans** (student is the borrower)
- PLUS** (either parent is the borrower, only one is needed) or **Grad PLUS Loans** (grad student is the borrower)
- Private/Alternative Loans** (student is the borrower and parent will be the co-signer)

ACCEPTED BY: _____

(Parental SIGNATURE)

DATE: _____

IF NOT RENEWING (please check):

_____ **OTHER ARRANGEMENTS MADE**

_____ **STUDENT GRADUATED**

_____ **STUDENT NOT RETURNING TO SCHOOL**

24-25