

2nd Meeting Email Confirmation Script #2

Dear Client,

As part of your plan, John would like to continue the next steps in the College Financial Planning process.  Being that Emily is in her senior year, we would like to be as valuable as we can during the admissions process.

Just as a reminder, this meeting consists of the following:

* Provide planning recommendations to reduce EFC (Estimated Family Contribution).
* Provide financial aid award estimates for an unlimited number of schools, & recommend additional schools to be considered.
* Provide recommendations for the best way to pay your share of college costs.
* Provide cost-efficient borrowing strategies to help keep financial goals in line, along with cash flow strategies for college years and beyond.
* Provide complete financial overview on college, cash flow, and retirement & develop a plan to improve each area.
* Provide strategies that legally protect your savings & retirement accounts from the financial aid formulas.
* Provide strategies on how to possibly use your home equity so that it helps, rather than hurts, in the financial aid formulas.