

# A Quick-Start Guide to College Planning with CAP

You don't have to be an expert to save clients tens of thousands on college. Follow this quick-start guide to make college planning easy.

- 1** Choose a “first case” - Whether it's a current client, a co-worker, a family member, or friend, pick someone with a high schooler you can help today. Let them know you're testing out a new service and invite them to participate, potentially for free.
- 2** Under your Clients tab in CAP, click Add New Client and complete the Facts section. For this case, we recommend entering the data yourself or with the client present. [Here's an idea of the kind of information you'll need](#) to have handy. This normally takes 10-15 minutes, but if you have more time, we recommend following along with the [College Aid Pro Foundations Course](#) for the best experience.
- 3** Join us for our next CAP Quick-start Call [here](#) to refresh on key concepts and ask specific question about your case.
- 4** Follow our Meeting-1 Agenda (next page) to have a great college-planning discussion with your client.



# Introductory College-Planning Agenda

Below is a guide to a low-prep college planning discussion that brings clarity to college costs and ensures great outcomes.

- 1. Facts** - With the client, go through each section of the Facts tab and confirm their information. Use these "Notes" pop-out for help.
- 2. Pre-Approval** - Complete the College Pre-Approval tab to establish their budget - do this together through a consultative discussion.
- 3. Schools** - Using the search bar, add schools the client is already considering. If they're not sure, add an in-state state school, an out-of-state state school, a private school, and an elite private school.
- 4. Projections Reports** - Walk through the client's projections in the Reports section under Projections reports, including:
  - Net cost of schools (*First Year* and *All Four Years* reports)
  - Expected borrowing at each school (*Borrowing* report)
  - Their bottom-line projected outcomes (*Outcomes* report)
- 5. Refine the school list** - Go back to the Schools tab and remove schools that don't provide a strong financial outcome (the schools with an affordability profile of Caution from the Outcomes report), or consider revising the Pre-Approval to bring schools within budget.
- 6. Repeat as needed** - Continue the previous steps until all the schools listed on the Schools tab are schools with Ideal, Great, or Good affordability profiles.
- 7. Rebuild the school list** - Use the Advanced Search on the Schools tab to find other great schools the family wasn't thinking about.
- 8. Client Portal or PDF** - Your clients now have a list of schools that are all affordable. Provide family access using the Collaborate option under Invite, or export a PDF and send it to them as a deliverable.

# A Supportive Follow Up

Schedule a follow-up call in 2-4 weeks to check in and see how your clients are doing. Offer guidance on questions and how the process will unfold.

Finally, let them know you help families get their students to and through school, and navigate other financial challenges, including:

- Help with completing financial aid forms
- Managing the application process and deadlines
- Help with interpreting and appealing financial aid awards
- Building a plan to pay for all 4 years, including strategic borrowing if needed
- Evaluating tax-planning opportunities associated with education funding (AOTC, shifting gains, small business owner strategies, etc.)
- Incorporating these costs and borrowing into their holistic financial plan

## Download our Year-by-Year Guides!

[Freshman](#)

[Sophomore](#)

[Junior](#)

[Senior](#)

### Still have questions? We've got answers:

The best way to get quick support is by clicking **HELP** at the top of your screen while logged in. We generally respond the same day to HELP inquiries.

We also offer bi-weekly live [CAP Roundtable webinars](#) every other Wednesday at noon ET for our CAP members. When logged in, you can register for those by clicking the banner at the top of your screen. The previous CAP Roundtables are recorded and saved in the Community under the Resources Library category.

The **CAP Community** is a forum of about 600+ professionals using College Aid Pro. Posting a question to the forum usually results in a wide variety of crowd-sourced input, which can be very helpful. Keyword search this Google for college planning.

