

## **Script For The Second Appointment- The Review Appointment**

1. What questions do you have that came up since we were together last?
2. Has anything changed?
3. I have a few more questions for you.
4. Review what we talked about last week. Let them know you heard what they were saying was important.
  - a. Highlight the goals that need to get accomplished
  - b. Expressed in last meeting
  - c. Emotional and motivational
  - d. What results would light them up
    - How would you feel if we could do all that?
5. Did I miss anything?

I'm happy to say we have good news!!!

We did some analytics and diagnostics on your finances using our college planning software and calculators.

Here's what we found...

Note: Use "**College Planning Flowchart**" here as visual presentation tool

### **Section 1: Academics and student positioning**

Description:

Academics- career planning- student positioning- college selection- admission & application coaching- Forms and deadlines- staying on track- SAT/ACT prep- visitation strategies-CLEP

We found ways to help the student reduce their time spent in college and get admitted to the schools he / she chooses.

Pocket story

### **Section 2: Identifying all the costs (True cost)**

Description:

Determine the full and complete costs at different colleges.  
Costs include transportation, personal and extras (skiing, etc.).  
Keeps you from being caught unprepared... scrambling at the last minute

Pocket story

### **Section 3: Reducing the costs**

Description:

Financial aid opportunities and good student positioning creates demand and competition for your student. You can attend a private school for the same cost as a public school

We found 4 financial aid strategies and 6 income planning strategies  
\$9,000 - \$12,000 estimated savings per year

Pocket story

#### **Section 4: Paying the balance**

Description:

We found 4 cash flow strategies

\$12,000 - \$16,000 estimated savings per year

Pocket story

#### **Section 5: Borrowing strategies**

Description:

- Your largest expenses are not the debt itself; it's the interest.
- Give examples of 10 years vs. 20 & 30 years.
- Reduce the time needed to repay the loans.
- Reduce the need for loans and reduce the interest paid on loans

**Sum it up in one sentence** (tell them what you told them)

Well that sounds great.... Where do we go from here?

Here's how we work together:

We'll need several meetings in order to...

- Review your goals to assure that you're on course
- Discuss the strategies... and discuss the options
- Decide which strategies to use and to what degree
- Involve affiliate partners and team members (CPA etc)

Here's a timeline

How does that sound?