

# CAMPUS CONSULTANTS INC.

EDUCATIONAL FINANCIAL CONSULTANTS  
1202 LEXINGTON AVENUE #327  
NEW YORK, NEW YORK 10028  
212 861-8806

www.CampusConsultants.com

Thank you for your interest in our services. For many families, the concept of paying a fee to an independent financial aid consulting firm when you want to reduce college expenses may seem ironic - given the federal FAFSA financial aid application form is free and can be completed electronically or on paper without professional help. And there is no requirement that you must engage a professional to complete all the various other aid applications. However there can be a tremendous financial difference between simply applying for aid on your own versus hiring a professional to plan in advance and then assist you with applying for aid in such a way so as to maximize the amount of assistance awarded. Indeed in a study funded by the Gates Foundation, the U.S. Department of Education and others, researchers from Harvard, Stanford, the University of Toronto, and the National Bureau of Economic Research concluded that participants in a field experiment who had the direct assistance of an independent financial services professional received significantly more financial aid compared to those in the experiment who had information about financial aid but handled the process on their own.

Given the two year income look-back period in the aid formulas, we recommend that families interested in securing the most aid possible enroll with our service as early as the time when the student is in 9<sup>th</sup> grade – or as soon thereafter as possible. Please be aware that our service does not involve an annual membership fee, so there are no savings with our fees by waiting to enroll.

Using our professional service will ensure that the best strategic financial aid plan for your situation is implemented in advance - and that costly mistakes are avoided throughout a lengthy process so as to maximize financial aid eligibility. In this way, you will pay the least amount of money for college expenses at the school of choice. So over the long term, our service is one of the best investments you can make.

If you have any questions regarding our service or our fees, please contact us at the above telephone number during normal weekday business hours. Unfortunately, we cannot answer any questions regarding your eligibility for aid until after you enroll with our service and we have analyzed your situation. Since some of our clients prefer to hand deliver their paperwork or send their materials via messenger or overnight delivery services such as Federal Express, we have listed our correspondence address on the letterhead above. This address is at a UPS Store located midblock between 81<sup>st</sup> and 82<sup>nd</sup> Streets on the west side of Lexington Avenue. They are open Monday through Friday from 8:00 a.m. until 7:30 p.m., Saturdays from 9:15 a.m. until 5:00 p.m., and Sundays from 11:15 a.m. until 4:00 p.m.

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Please note: We *are not* a "scholarship search service" that attempts to match students with scholarships awarded by outside organizations. Such scholarship search services have received unfavorable attention from the media. Our firm assists students with maximizing eligibility for need-based aid funded by the federal and state governments, as well as the colleges themselves.

***"Campus Consultants, a New York-City based financial aid planning service, is one of the most knowledgeable guides, and...has counseled thousands of families on how to qualify for the most aid."***

*from U.S. NEWS COLLEGE GUIDE*

***"The best in the business."***

*CNBC television anchorman Tyler Mathisen*

**CAMPUS CONSULTANTS, INC.**  
**2023-2024 FEE SCHEDULE**  
**(Rates in effect through June 30, 2024)**

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FINANCIAL AID PLANNING SERVICE: \$2,450 (**This is not an annual membership fee.**)

Payments: \$950 at time of enrollment with our firm; check, money order or cash accepted.  
Balance due prior to release of data for the completion of the standardized aid forms for the first year in which aid is being sought for the student.

This Service includes:

- Estimates of how much the family will be expected to contribute (EFC) to college costs based on the federal aid formula, as well as the CSS institutional aid formula used by many private colleges and some state universities.
- Assistance with the preparation of the standardized aid form(s) which will include the Free Application for Federal Student Aid (FAFSA) and if appropriate, the College Board's CSS PROFILE form to apply for aid for one academic year. Such assistance will provide you with customized responses based on your unique situation so as to maximize your aid eligibility.
- Individual consultations (predominantly by phone and email) through the financial aid application process for the first year for which aid is sought. We budget approximately two hours of total consultation time per student/family. (This direct consultation time by phone or email is in addition to the significant amount of time we expend on work we perform on a client's behalf when not directly consulting with them.)
  - After we perform a preliminary financial analysis of your situation, we will schedule an initial consultation (approx. 50 min) during which we will explain the various steps involved in the financial aid process, and if appropriate, we will provide you with specific recommendations for increasing your aid eligibility based upon your personal situation.
  - Additional consultations will occur throughout the process as we assist you in maximizing your aid eligibility, preparing the aid forms, and reviewing the financial aid offers.
- Additional consultation time after the first two hours of consultation time is billed at \$450/hour. In our experience, most of our clients do not require such additional time if they are efficient working with us.
- Additional fees may apply for the review or preparation of Noncustodial Parent aid applications, Business/Farm Supplements, individual college aid forms, education loan forms, and for detailed appeals of initial aid offers as well as for assistance involving additional students in the same family seeking aid.

*PLEASE NOTE:* Prior to your consultation, we will be performing a preliminary financial analysis related to your aid eligibility. If we determine there is virtually no chance of your receiving need-based aid in any year, we will advise you of this fact prior to your initial consultation and/or completing any aid forms. If you choose not to go any further with our service at that point, we will issue you a \$450 partial refund of your \$950 enrollment deposit. Given we will be working independently on your behalf prior to the initial consultation, this policy regarding a partial refund of your enrollment deposit will also apply if you subsequently decide not to continue working with us for any other reason prior to your initial consultation. Please note that we reserve the right to alter the service or charge a premium for our services if your earliest financial aid deadline is less than four weeks from the time of enrollment with our service.

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## PLEASE READ THE FOLLOWING BEFORE COMPLETING THIS QUESTIONNAIRE

1. When completing the following questionnaire, please
  - do not leave any items blank
  - use numbers instead of words for all financial questions.
  - use zeroes whenever appropriate.
2. We will review the information on this questionnaire carefully to ensure that your situation is properly represented. The information on this form will be used as a starting point to determine your eligibility for financial aid. We do not simply take the data and complete the analysis. Please provide your best possible estimates.
  - You need not wait for your 2022 income tax returns to be completed to enroll with our service.
  - You need not wait until you have a final list of colleges being considered.

**The sooner you enroll with our service and begin planning, the better your chances of receiving the most financial aid.**

3. Once you have completed the form, return it along with a **complete, legible** copy of all pages of your most recently completed Federal and State Income Tax Returns (including all schedules, attachments, etc.) as well as any 2022 w-2(s) issued to you by any employer(s) of yours in 2022. If applicable, enclose a copy of your recent paystub(s) from your employer(s) if various deductions and/or year-to-date amounts are listed. If the student filed a 2022 tax return, please include a complete copy. Please include copies of any 2022 W-2s the student received, even if no return was filed. (Because documents are sometimes lost by the Post Office, we recommend that you send a photocopy of your copy of any documents.) If you are the owner or part owner of a corporation and/or you are a general partner in a partnership: please send us a complete copy of the most recent corporate and/or partnership federal income tax return. NOTE: We realize that your financial situation may have changed and your 2021 or 2022 income may no longer reflect your current situation. If this is the case, please call our office during weekday business hours before you complete and /or submit this questionnaire. We will still however need to review your most recent tax return (either 2022 or 2021) to get some idea of the way your tax return is completed i.e. the way income is reported, which IRS schedules are normally completed, etc.
4. Mail the completed questionnaire and tax forms to the above address, along with your check or money order for nine hundred fifty dollars (\$950.00), which will be applied against the total fee for our services. To avoid delays, please complete all the items on this form and please be sure to review the final points at the bottom of the last page. We suggest using Priority Mail (2-3 Day delivery) or another expedited delivery method.
5. After we receive your completed form, we will perform a preliminary financial analysis and contact you to schedule your appointment. If you have questions regarding our services or our fees, feel free to contact us. Unfortunately, we cannot answer any questions relating to your aid eligibility until after we have reviewed your questionnaire and have completed our financial analysis.

**ALL FINANCIAL INFORMATION AND YOUR NAME WILL BE HELD STRICTLY CONFIDENTIAL**

1. PARENT'S NAME (S) \_\_\_\_\_
2. STREET ADDRESS \_\_\_\_\_  
CITY, STATE, ZIP CODE \_\_\_\_\_
3. PHONE NUMBER (S) <Include area code and any applicable extension or department>:  
HOME: (\_\_\_\_) \_\_\_\_\_ FAX: (\_\_\_\_) \_\_\_\_\_  
  
PRIMARY EMAIL: \_\_\_\_\_ *As an eco/green firm, we attempt to*  
2<sup>ND</sup> (back-up) EMAIL: \_\_\_\_\_ *limit fax and snail mail exchanges.*  
  
FATHER: CELL (\_\_\_\_) \_\_\_\_\_ WORK (\_\_\_\_) \_\_\_\_\_  
MOTHER: CELL (\_\_\_\_) \_\_\_\_\_ WORK (\_\_\_\_) \_\_\_\_\_

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**ANSWER QUESTIONS 4 THROUGH 10, FOR THE YEAR THE STUDENT WILL ENTER COLLEGE**

4. Year Student Expects To Enter College: \_\_\_\_\_
5. Parent's State Of Legal Residence: \_\_\_\_\_
6. Parent's Household Size: \_\_\_\_\_ (Do Not Include Self-Supporting Older Children)
7. Regarding Item 6, How Many Will Be In College At Least Half Time? \_\_\_\_\_
8. Regarding Item 7, How Many Of The Student's Parents Will Be In College At Least Half Time? \_\_\_\_\_
9. Regarding Item 6, How Many Will Be In Elementary Or Secondary School? \_\_\_\_\_

**Complete The Following Regarding Siblings Below:**

<List Grade(s) For Sibling(s) For The Year The Student Will Enter College>

Names	Date of Birth	Grade	Tuition (If Any)

10. Dates of Birth of the Parent(s) / Stepparent In The Household:  
Father's / Stepfather's DOB: \_\_\_\_\_ Mother's / Stepmother's DOB: \_\_\_\_\_

11a. Parent's Current Marital Status (Circle One): Married Separated Divorced Widowed Never Married

11b. (Except for "Never Married", please provide month & year for the marital status above) \_\_\_\_\_

**If Separated Or Divorced From Student's Other Parent, Answer Questions 11a Through 11d:**

- 11c. Parent With Whom Student Resides The Most: \_\_\_\_\_
- 11d. Is There Any Agreement Concerning a Contribution for the Student's Education? (Y or N) \_\_\_\_\_  
If Yes, List Annual Amount: \$ \_\_\_\_\_
- 11e. Estimated Child Support Received For All Children In 2022 \$ \_\_\_\_\_
- 11f. Estimated Alimony Received For 2022 \$ \_\_\_\_\_

**For parental information (questions 12-31):** If parents are divorced or separated, list only the financial information for the parent who provided the greater financial support for the student. If such parent has remarried, list the financial information for the stepparent as if he or she was the student's natural parent.

**If your 2022 tax return is already completed:** you may skip questions 12-18 as we will get such items from your 2022 return and any 2022 w-2s. **And if your 2023 income will be significantly different from your 2022 income:** please call our office during weekday business hours for specific instructions for completing this questionnaire. For Questions 12 and 13: "Gross Salary" refers to the total income you were paid by all employers who withheld payroll taxes and gave you a 2022 W-2 form. This is your salary *before* any deductions for payroll taxes, pension contributions {401(k), TDA, 403(b), etc.}, flexible spending plans, HSA accounts, health insurance premiums, etc. This amount is not your take-home pay. For the "Amount of Gross Salary contributed to tax-deferred pension", list the amount contributed to a 401(k), 403(b), Tax Deferred Annuity (TDA), etc. by year-end 2022. Do not include IRA, KEOGH, or SEP Contributions, which should be listed in Question 23. Do not include any pensions or unemployment benefits received, which should be included in Question 18.

**12. 2022 Father's (Stepfather's) Gross Salary** \$ \_\_\_\_\_  
**Amount of Gross Salary contributed to tax-deferred pension** \$ \_\_\_\_\_

**13. 2022 Mother's (Stepmother's) Gross Salary** \$ \_\_\_\_\_  
**Amount of Gross Salary contributed to tax-deferred pension** \$ \_\_\_\_\_

**For Questions 14 And 15, Net Income-Business** applies only to unincorporated, self-employed workers, those who own a Subchapter s corporation and/or those who own a share of a partnership. This figure will be similar to the bottom line you have or will report on Schedule C and/or on page 2 of Schedule E of the 2022 tax return. If there is a net loss, list that figure in parentheses. We are interested in your net income *after* business expenses after deducted (including any expense for salary paid to yourself from your corporation), not your total gross receipts before expenses. Please do not include any salary to be reported on a W-2 form by a corporation that you own; such salary reported on a w-2 form should listed in #12 or # 13.

**14. 2022 Father's (Stepfather's) Net Income-Business** \$ \_\_\_\_\_  
**15. 2022 Mother's (Stepmother's) Net Income-Business** \$ \_\_\_\_\_

**16. 2022 Net Income From Property Rental** \$ \_\_\_\_\_  
(Gross Rent Received Less Rental Expenses Including Depreciation)

**17. 2022 Interest And Dividend Income** \$ \_\_\_\_\_

**18. All Other 2022 Taxable Income of Parents** \$ \_\_\_\_\_  
(Pensions, Alimony, Capital Gains, Unemployment Benefits, Etc.)

**19. 2022 Social Security Benefits** (Include amounts paid to parents for child<ren>) \$ \_\_\_\_\_

**20. 2022 Pre-Tax Contributions to Dependent Care, Medical Spending Accounts and/or Health Savings Accounts [Please specify amount(s) and type in #53]** \$ \_\_\_\_\_

**21. Other 2022 Non-Taxable Income Of Parents** \$ \_\_\_\_\_  
(Child Support, Interest On Tax-Free Bonds, Etc.)

**22. 2022 Health Insurance Premiums Paid or Deducted from Wages** \$ \_\_\_\_\_  
**2022 Medical and Dental Expenses Not Covered by Insurance / Flex Plan** \$ \_\_\_\_\_

**23. Estimated 2022 Deductible IRA/KEOGH Contributions.** (Do not include contributions to Tax-Deferred Plans which you listed in #12 or #13 above.) \$ \_\_\_\_\_

**ASSET INFORMATION**

**Question #24 Refers To Your Primary Residence.** If you do not own your primary residence (for example, you rent an apartment) but you *do* own real estate, enter zeroes for question #24 and list the property in question #25.

24. **Home Equity: Current Market Value** \$ \_\_\_\_\_  
**Outstanding Debt On Property** \$ \_\_\_\_\_  
(i.e. first & second mortgages, outstanding balance on home equity loan, etc.)  
**Year Of Purchase** \_\_\_\_\_  
**Original Purchase Price** \$ \_\_\_\_\_

25. **Other Real Estate: Current Market Value** \$ \_\_\_\_\_  
**Outstanding Debt On Property** \$ \_\_\_\_\_  
**Year Of Purchase** \_\_\_\_\_  
**Original Purchase Price** \$ \_\_\_\_\_  
(If more than one property, please provide a breakdown in #53, listing the same four items for each property.)

26. **Net Worth of Business and/or Farm** (total assets minus liabilities) \$ \_\_\_\_\_  
(If a part owner, list only your share of the net worth.)

**For Items #27 And #28, Do Not Include Tax-Deferred Retirement Accounts.**  
(List Tax-Deferred Retirement Accounts In #30)

27. **Liquid Assets:** Cash And Checking Accounts: \$ \_\_\_\_\_  
Savings and Money Market Accounts: \$ \_\_\_\_\_

28. **Other Investments (At Current Net Market Value):**  
Certificates Of Deposit \$ \_\_\_\_\_  
Stocks and Mutual Funds \$ \_\_\_\_\_  
Municipal Bonds \$ \_\_\_\_\_  
Other Bonds \$ \_\_\_\_\_  
Land Contracts Or Mortgages Owned \$ \_\_\_\_\_  
Trust Funds \$ \_\_\_\_\_  
Other Investments (Specify) \$ \_\_\_\_\_  
Assets held in the name(s) of student's sibling(s) living in the household \$ \_\_\_\_\_  
Funds contributed funds to a state-sponsored prepaid plan or tuition savings account (e.g. 529 plans, Coverdells) for any member of the household? \$ \_\_\_\_\_

If any such funds are a 529 or Coverdell, please list the type of plan(s), beneficiary, and current values in # 53.)

29. **Are Any Stocks Included In Item 28, Shares Of Privately Owned Companies?** (Y/N) \_\_\_\_ If yes, list net value of stock \$ \_\_\_\_\_

30. <b><u>Retirement Accounts</u></b>	Father (Stepfather)	Mother (Stepmother)
IRA/KEOGH	\$ _____	\$ _____
Tax Deferred Annuities (TDA)	\$ _____	\$ _____
401(k), 403(b), 457(g), etc.	\$ _____	\$ _____
Other	\$ _____	\$ _____

31. **Amount Of Consumer Debt Outstanding** (Credit and charge cards, personal loans, etc.) Provide breakdown in # 53. \$ \_\_\_\_\_

**STUDENT INFORMATION**

32. Student's Full Legal Name \_\_\_\_\_

33. Student's Date Of Birth \_\_\_\_\_

34. Student's Social Security Number (Very Important!) \_\_\_\_\_

35. Is The Student A United States Citizen? \_\_\_\_\_ If no, explain in #53.

36. Does Student Live With Parents? \_\_\_\_\_ If no, explain in #53.

37. Student's Marital Status (single, married, divorced, etc.) \_\_\_\_\_

38. Current School and Location \_\_\_\_\_

39. Month & Year Of High School Graduation (Expected or actual) \_\_\_\_\_

**Note: If student is married, include spouse's income and assets when answering the following questions. Also, do not include any financial aid in your answers. Use zeroes when appropriate.**

40. Student's Salary, Wages, Etc. For **2022** \$ \_\_\_\_\_

41. **2022 Other Taxable Income** (interest, dividends, etc.) \$ \_\_\_\_\_

42. **2022 Other Non-Taxable Income** \$ \_\_\_\_\_

43. **Savings And Other Assets** [Savings Accounts, Stocks, Trusts, Custodial (UTMA/UGMA) Accounts, U.S. Savings Bonds, Etc.] \$ \_\_\_\_\_

44. **College Grants, Scholarships, Loans Already Awarded, or tuition benefits from parents' employers.** \$ \_\_\_\_\_  
Source of these funds: \_\_\_\_\_

45. **List Colleges The Student Is Considering Attending:**  
If specific schools are unknown at this time, please list the types of schools being considered. For example, Private College, State University, Boarding Away, Commuter, Ivy League, Etc.  
**Important:** If your child is a HS senior who is applying Early Decision or Early Action to any college, please note ED or EA next to the name of any applicable school(s) on your list. Additionally, please mention such colleges) and the admission option (i.e. EA or ED) in the right margin next to the parent name(s) on the first page of this questionnaire.

School	City, State	Course/Major
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**If necessary, list additional school(s) on a separate sheet of paper and attach to the form.**

46. **Has The Student Received Or Do You Anticipate Any Gifts For College Expenses From Grandparents, Relatives, Or Friends?** (Y/N) \_\_\_\_\_ If yes, state amount \$ \_\_\_\_\_

47. **List Family Members Who Are Already Enrolled In College:**

Name	College	City, State	Year in School 2022-2023 (e.g. Soph., Jr.)

48. **Do You, Your Spouse, Or Your Children Currently Receive Any Social Security And/Or VA Benefits?** Y/N \_\_\_\_\_ If yes, please answer the following:

Month And Year Social Security Benefits Will Expire \_\_\_\_\_  
 Total Monthly Benefit in 2022 \$ \_\_\_\_\_

Month And Year VA Benefits Will Expire \_\_\_\_\_  
 Total Monthly Benefit in 2022 \$ \_\_\_\_\_

49. **Will You Be Leaving Your Job Or Reducing The Amount Of Time That You Work?** Y/N \_\_\_\_\_  
 If yes, please explain when this will occur and estimate your monthly income from work after that date.

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50. **Are You Considering Making Any Major Purchases In The Near Future** (i.e. new car, home repairs, etc.)? (Y/N) \_\_\_\_\_  
 If yes, list amount of such purchases: \$ \_\_\_\_\_

51. **2022 Child Support Paid To A Former Spouse** \$ \_\_\_\_\_

52. **2022 Alimony Paid To a Former Spouse** \$ \_\_\_\_\_

53. **If you anticipate any major changes in your family's financial situation during the next few years, or if there are any special circumstances or unusual items regarding your financial situation, please explain.** If 2023 income will differ by more than 10% compared to 2022 income, please explain below and contact our office before submitting this form. (Use additional sheets if necessary.)

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**Final points to note:**

- **Include a complete, legible copy including all schedules, attachments, and W-2s of your most recently completed federal and state income tax returns (as well as the student's returns, if filed) along with any 2022 W-2s when you mail this form back to Campus Consultants. If applicable, include a copy of a recent paystub from the employer(s) for each (step)parent in the household.**
- **If you are the owner or part owner of a corporation or a general partner in a partnership, please send us a copy of the most recent corporate and/or partnership income tax return(s).**
- **In addition, please remember to enclose your check or money order for \$950.00 payable to Campus Consultants Inc. This payment is an enrollment deposit towards our total fee.**
- **By submitting this questionnaire, you acknowledge that you have read and understand our Fee Schedule and that you agree to the schedule of fees and other information listed on same.**