

**CAMPUS CONSULTANTS INC.  
1202 LEXINGTON AVENUE  
#327  
NEW YORK, NEW YORK 10028  
(212) 861-8806**

Thank you for your inquiry regarding our services. To enroll with our service, follow the instructions on the front page of the questionnaire that follows. Please be aware that you need not wait to enroll until you know which colleges the student is interested in attending. The formulas used to determine aid eligibility are basically the same at all schools. Indeed our research has shown that the sooner families begin using our service, the more aid they are likely to receive. It is therefore in your best interest to return your completed questionnaire and most recent tax returns to us as soon as possible. For some families the sophomore or junior year in high school is not too early to enroll, although we will always do our best no matter how little planning time is involved. Since our service is also very seasonal, prompt response will insure timely service. Please note that since we do not have a secure web site and email is not secure, you should print out the blank questionnaire that follows, complete it, and then mail the completed questionnaire and other required materials to the address listed above.

For many families, paying a fee to a service when you want to reduce college expenses may seem ironic. However, our experience in counseling several thousand families and students over the past 25 years has shown that few families have the time and/or the expertise to know how to qualify for the most financial aid and how to choose the least expensive financing options. Recent investigations by state attorneys general and other government officials have also exposed the fact that college administrators often act more to benefit themselves and their employers when dispensing "free" advice to students and their families. By using our professional service, you will insure that costly mistakes are avoided and that you will pay the least amount of money for college expenses at the school of your choice. 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 or send us an email. Unfortunately, we cannot answer any questions regarding your eligibility for aid until after you have enrolled with our service. Since many 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 a correspondence address on the letterhead above. This address is at a UPS/ Mail Boxes Etc. store located between 81<sup>st</sup> and 82<sup>nd</sup> Streets. They are open Monday through Friday from 9:15 a.m. until 6:45 p.m. and on Saturdays from 10:15 a.m. until 4:45 p.m.

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Many families erroneously assume that we are a "scholarship search" service that attempts to match students with scholarships awarded by outside organizations. Such services have recently received unfavorable attention from the media, with the federal government closing a number of disreputable firms. 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.**  
**2009-2010 FEE SCHEDULE**  
**(Rates in effect through April 2010)**

Please note that we reserve the right to charge an additional overtime premium and/or to alter the service provided to those clients who enroll with our service less than four weeks before the earliest financial aid form filing deadline.

\*\*\*\*\*  
**FINANCIAL AID PLANNING SERVICE \$1450.00**

Method of payment: \$700.00 at time of enrollment with our firm.  
Balance due prior to release of data for the completion of the standardized aid forms.

This service includes:

- \* Customized worksheets detailing how much the family will be expected to contribute to college costs based on both the federal and the CSS institutional aid formulas.
- \* Financial aid fact sheets on the colleges being considered.
- \* A personal consultation by appointment (up to one hour and a half). During this meeting, we will review with you the computer printouts and aid fact sheets listed above, 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.
- \* At the appropriate time, we will assist you with the preparation of the standardized aid form(s) which will include the Free Application for Federal Student Aid (FAFSA) and if appropriate, the CSS' Financial Aid PROFILE form for one academic year.
- \* Detailed correspondence from our office during the fall and spring terms which precede the academic year for which aid is desired. These letters are designed to assist you throughout the aid process so that maximum benefits can be achieved.

Additional consultation time after the first 90 minutes and/or additional fees for the review or preparation of Noncustodial Parent Statements, Business/Farm Supplements, Loan Applications, and individual college aid forms will be charged at the rate of \$300.00 hour. These charges can be avoided or minimized if you follow our guidelines and make efficient use of time when working with us.

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*PLEASE NOTE:* Prior to your consultation, we will be performing a preliminary analysis of 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 booking your consultation. If you choose not to go any further with our service, we will refund you \$400.00 on your enrollment deposit.

There is a Professional Cancellation Charge of \$400.00 for appointments that are canceled with less than 24 hours notice.

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**PLEASE READ THE FOLLOWING BEFORE COMPLETING THIS QUESTIONNAIRE**

1. When completing the following questionnaire, please
  - print out our questionnaire prior to completing any items
  - 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 insure 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 2009 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 and W-2s). If the student filed a tax return, please include a complete copy with W-2s well. (Because documents are sometimes lost by the Post Office, we recommend that you send a photocopy of your copy of the returns.) If you are the owner or part owner of a corporation, or are a general partner in a partnership, please send us a complete copy of the most recent corporate or partnership income tax return.
4. Mail the completed questionnaire and tax forms to the address on our letterhead, along with your check or money order for seven hundred dollars (\$700.00), which will be applied against the total fee for our services. To avoid delays, please make sure that you have completed all the items on the questionnaire.
5. After we receive your completed form, we will perform a preliminary 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 computer analysis.

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

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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 # (\_\_\_\_) \_\_\_\_\_

CELL (FATHER): \_\_\_\_\_ (MOTHER): \_\_\_\_\_

PARENT'S EMAIL ADDRESS (if applicable): \_\_\_\_\_

WORK (FATHER) (\_\_\_\_) \_\_\_\_\_ FAX # (\_\_\_\_) \_\_\_\_\_  
(MOTHER) (\_\_\_\_) \_\_\_\_\_ FAX # (\_\_\_\_) \_\_\_\_\_

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

1. Year Student Expects To Enter College: \_\_\_\_\_
2. Parent's State Of Legal Residence: \_\_\_\_\_
3. Age of the Older Parent In The Household: \_\_\_\_\_
7. Parent's Household Size: \_\_\_\_ (Do Not Include Self-Supporting Older Children)
8. Regarding Item 7, How Many Will Be In College At Least Half Time? \_\_\_\_\_
9. Regarding Item 8, How Many Of The Student's Parents Will Be In College At Least Half Time? \_\_\_\_\_
10. Regarding Item 7, 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)

**11. Parent's Current Marital Status (Circle One): Married Separated Divorced Widowed Never Married  
If Separated Or Divorced From Student's Other Parent, Answer Questions 11a Through 11d:**

- 11a. Parent With Whom Student Resides The Most: \_\_\_\_\_
- 11b. Is There Any Agreement Concerning a Contribution for the Student's Education? (Y or N) \_\_\_\_\_  
If Yes, List Annual Amount: \$ \_\_\_\_\_
- 11c. Estimated Child Support Received For All Children In 2009 \$ \_\_\_\_\_
- 11d. Estimated Alimony Received For 2009 \$ \_\_\_\_\_

**Note: For Items 12-31**, if parents are divorced or separated, list only the financial information for the parent with whom the student resides the most. If such parent has remarried, list the financial information for the stepparent as if he or she was the student's natural parent.

**For Questions 12-23:** Provide your best estimates for the **2009** calendar year. Please don't simply copy your income figures from your 2007 or 2008 tax return.

**For Questions 12 And 13:** Gross Salary refers to the total income you will be paid by all employers who withhold payroll taxes and will give you a W-2 form for 2009.

- This is your salary *before* any deductions for payroll taxes, deferred compensation [401(k), TDA, 403(b), etc.]
- This amount is not your take-home pay.
- Do not include any pensions or unemployment benefits, which should be included in Question 18.
- For **Deferred Compensation**, list the amount you expect to defer into a 401(k), 403(b), Tax Deferred Annuity (TDA), etc. by year-end 2009 (If you are unsure about this, ask your payroll department.) Do not include IRA, KEOGH or SEP Contributions, which should be listed in Question 23.

**12. 2009 Father's (Stepfather's) Gross Salary** \$ \_\_\_\_\_  
How much of Gross Salary will be **Deferred Compensation?** \$ \_\_\_\_\_

**13. 2009 Mother's (Stepmother's) Gross Salary** \$ \_\_\_\_\_  
How much of Gross Salary will be **Deferred Compensation?** \$ \_\_\_\_\_

**For Questions 14 and 15, Net Income-Business** applies only to unincorporated, self-employed workers.

- This figure will be similar to the bottom line you will eventually report on Schedule C of the 2009 tax return. If a loss, list this figure in parentheses.
- We are interested in your net self-employment income *after* business expenses, not your gross receipts.
- Do not include any salary to be reported on a W-2 form, which you should list in #12 or # 13.

**14. 2009 Father's (Stepfather's) Net Income-Business** \$ \_\_\_\_\_

**15. 2009 Mother's (Stepmother's) Net Income-Business** \$ \_\_\_\_\_

**16. 2009 Net Income From Property Rental** \$ \_\_\_\_\_  
(Gross Rent Received Less Rental Expenses Including Depreciation)

**17. 2009 Interest And Dividend Income** \$ \_\_\_\_\_

**18. All Other 2009 Taxable Income of Parents** \$ \_\_\_\_\_  
(Pensions, Alimony, Capital Gains, Unemployment Benefits, S Corp profits, etc..)

**19. 2009 Social Security Benefits** (Include amounts paid to parents for child<ren>) \$ \_\_\_\_\_

**20. 2009 Pre-Tax Contributions to Dependent Care & Medical Spending Accounts** \$ \_\_\_\_\_

**21. Other 2009 Non-Taxable Income of Parents** \$ \_\_\_\_\_  
(Child Support, Interest on Tax-Free Bonds, IRS Dividend Exclusion, Etc.)

**22. 2009 Estimated Medical & Dental Expenses Not Covered** \$ \_\_\_\_\_  
**By Insurance** (include health insurance premiums paid or deducted from wages)

**1. Estimated 2009 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 \$ \_\_\_\_\_  
Have you contributed funds to a state-sponsored prepaid plan or tuition savings account for any member of the household? (Y/N) \_\_\_\_\_  
(If yes, list type of plan, beneficiary and current value in # 53.)

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

<b>30. <u>Retirement Accounts</u></b>	<b>Father (Stepfather)</b>	<b>Mother (Stepmother)</b>
IRA/KEOGH	\$ _____	\$ _____
Tax Deferred Annuities (TDA)	\$ _____	\$ _____
401(K)	\$ _____	\$ _____
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. Student's Current School \_\_\_\_\_

39. 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 **2009** (Estimated) \$ \_\_\_\_\_

41. **2009 Other Taxable Income** (interest, dividends, etc.) \$ \_\_\_\_\_

42. **2009 Other Non-Taxable Income** \$ \_\_\_\_\_

43. **Student's Savings and Other Assets** (Savings Accounts, Stocks, Trusts, Custodial Accounts, 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.

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

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 2009-10 (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 \$ \_\_\_\_\_

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

49. **Will You Will 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.

\_\_\_\_\_

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: \$ \_\_\_\_\_

52. **2009 Child Support Paid To A Former Spouse** \$ \_\_\_\_\_  
**2009 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.** (Use additional sheets if necessary.)

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Remember To:**

- **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 and W-2s if filed) when you mail this form back to Campus Consultants. If applicable, include a copy of a recent paystub from the employer(s) for each 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 or partnership income tax return.**
- **In addition, please remember to enclose your check or money order for \$700.00 payable to Campus Consultants Inc.**