



Making College Affordable

Dear Jason,

It has been several years since I was introduced to you to assist me with Melani's college planning. Though I knew the application process and what my chances were of getting any financial aid for Melani, I still felt strongly about working with you and having you guide us through this process once again.

Melani and I felt strongly from the beginning that a 4 year college was a priority over a community college. My concern was with my income level, I knew my chances would be slim to obtain any financial aid for her college education. However; your service helped Melani target her college of choice and she got accepted into Cal Poly San Luis Obispo, which she is totally enjoying.

Financially, you showed me options to pay for her tuition and opened up a much bigger picture of my overall financial goals. It was like getting a financial makeover, which to me was the most valuable part of your service. If all families who work with you would take advantage of this service, I guarantee they would not be disappointed.

I was able to get my finances in line with my goals. You introduced me to Geoff Wolcott of Financial West Group, I got my trust/will in order and you educated me on insurance. The peace of mind it has given me is such a big weight lifted off my shoulder. Through all these wonderful people I got to meet and work with, I feel I can concentrate on my priorities knowing that I am on the right track to my own retirement. I also am thrilled with the fact that my daughter is obtaining a great education so she can go out in the world and make her own contributions.

I will always recommend you to anyone who needs assistance with college planning. Too many families just don't have enough information about the college process and forego giving their children the best opportunity they may have. I feel very strongly that everyone needs to get educated about this so our children can make the biggest difference in our future.

With all my gratitude,

Iris Meister

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