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. 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. Note that since we cannot guarantee secure submission via our website or email, please 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. Using our professional service will insure that the best strategic financial aid plan for your situation is implemented and that costly mistakes are avoided. 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 services 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 have enrolled with us. Since some of our clients prefer to hand deliver their paperwork or send their materials via messenger or via 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 between 81st and 82nd Streets. They are open Monday through Friday from 8:45 a.m. until 7:00 p.m. and on Saturdays from 10:15 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 services have 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.
2011-2012 FEE SCHEDULE
(Rates in effect through April 30, 2012)

FINANCIAL AID PLANNING SERVICE: $1,550

Payments: $750 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.

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.
- Financial aid fact sheets on the colleges being considered.
- 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 for one academic year.
- Correspondence from our office during the fall and spring terms preceding the academic year for which aid is desired. These are designed to assist you throughout the aid process so that maximum benefits can be achieved.
- Individual consultations (predominantly by phone and email) throughout the financial aid application process. We budget approx two hours of total consultation time per student/family. (This time is in addition to the work we perform for you when not consulting directly with you.)
    - After a preliminary review, we will schedule an initial consultation (approx. 50 min) during which we will review with you the EFC figures 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.
    - Additional consultations will occur throughout the process as we assist in preparing aid forms and reviewing financial aid offers.
- Additional consultation time after the first two hours is billed at $350/hour. In our experience, most of our clients do not require such additional time.
- Additional fees may apply for the review or preparation of Noncustodial Parent applications, Business/Farm Supplements, Loan Applications, and individual college aid forms as well as for assisting multiple students in the same family.

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 your initial consultation and/or completing any aid forms. If you choose not to go any further with our service, we will refund you $400 on your enrollment deposit.

We reserve the right to charge a Professional Cancellation Fee of $400 for appointments that are canceled with less than 24 hours notice. 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 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 2010 or 2011 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 W-2s, all schedules, attachments, etc.). 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 tax return, please include a complete copy with W-2s as 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. NOTE: We realize that your financial situation may have changed and that the figures on your most recent tax return no longer reflect your situation. That is why we ask you to project your 2011 income on this questionnaire. We do however need to review your most recent tax return to get some idea of the way your return is completed (i.e. the way income is reported, which schedules need to be completed, etc.)

4. Mail the completed questionnaire and tax forms to the address on our letterhead, along with your check or money order for seven hundred and fifty dollars ($750.00), 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

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 # (____)________________________

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:_______________

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 2011** $_________
11d. **Estimated Alimony Received For 2011** $_________

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 **2011** calendar year. Please don't simply copy your income figures from your 2009 or 2010 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 2011.

- This is your salary *before* any deductions for payroll taxes, pension contributions {401(k), TDA, 403(b), etc.}, Flexible spending plans, health insurance premiums, etc. This amount is not your take-home pay.
- Do not include any pensions or unemployment benefits received, which should be included in Question 18.
- For payments to **tax-deferred pension**, list the amount you expect to contribute to a 401(k), 403(b), Tax Deferred Annuity (TDA), etc. by year-end 2011 (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. 2011 Father's (Stepfather's) Gross Salary $________________
Amount of Gross Salary contributed to **tax-deferred pension** $________________

13. 2011 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.

- This figure will be similar to the bottom line you will eventually report on Schedule C of the 2011 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. 2011 Father's (Stepfather's) Net Income-Business $ ________________

15. 2011 Mother's (Stepmother's) Net Income-Business $________________

16. 2011 Net Income From Property Rental $________________
(Gross Rent Received Less Rental Expenses Including Depreciation)

17. 2011 Interest And Dividend Income $________________

18. All Other 2011 Taxable Income Of Parents $________________
(Pensions, Alimony, Capital Gains, Unemployment Benefits, Etc.)

19. 2011 Social Security Benefits (Include amounts paid to parents for child<ren>) $________________

20. 2011 Pre-Tax Contributions to Dependent Care & Medical Spending Accounts $________________

21. Other 2011 Non-Taxable Income Of Parents $________________
(Child Support, Interest On Tax-Free Bonds, IRS Dividend Exclusion, Etc.)

22. 2011 Health Insurance Premiums Paid or Deducted from Wages **$________________**
2011 Medical and Dental Expenses Not Covered by Insurance / Flex Plan $________________

23. Estimated 2011 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 (e.g. 529 plans, Coverdells) 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 $________________

30. **Retirement Accounts**

	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. **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 2011** (Estimated) $_____________

41. **2011 Other Taxable Income** (interest, dividends, etc.) $_____________

42. **2011 Other Non-Taxable Income** $_____________

43. **Student's Savings And Other Assets** (i.e Savings, Mutual Funds, Stocks, Bonds, Custodial Accounts [UGMA/UTMA], Trusts, 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 2011-12** (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: $_______________

51. **2011 Child Support Paid To A Former Spouse** $ _____________
52. **2011 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.)
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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 $750.00 payable to Campus Consultants Inc.**