

Perspectives on Aid

An expert panel representing the country's leaders in financial aid analysis for the independent PK-12 market gathers together to provide distinct takes on the methods, manners, and mechanisms for how schools approach the process, including an introduction to new, recent models catching on throughout the industry.

Learning Objectives:

Participants will learn methods, manners, and mechanisms for how schools approach the financial aid process, including an introduction to new, recent models catching on throughout the industry.

Presenters:

Ron Beckmann, Financial Aid Director, TADS

Ron Beckmann is a thought leader in the K-12 financial aid industry. He currently serves as Financial Aid Director at TADS. Ron has worked with thousands of schools and organizations during his 16 year financial aid career. Mr. Beckmann leads the financial aid narrative for many schools across the United States. With his experience, he interprets that narrative for individual schools and help them understand what financial aid means to their institution. Ron has helped schools of all types and all financial aid models from traditional financial aid to tuition indexing. When talking to schools about financial aid, Ron delivers with his matter-of-fact, reasonable style. Those familiar with Ron expect to hear his front porch conversation about the weather (and sports when appropriate) before getting down to business. Mr. Beckmann is a graduate of the University of Minnesota and has spent time working in several industries, but admits financial aid is his favorite and is frequently heard to say that he has no life because he finds financial aid to be such a fascinating topic. When he's not crunching the numbers Ron finds pleasure through camping, fishing and sports. He plays a decent ping pong game. Ron resides in Maple Grove, MN with his wife Barb and dog Kibby. Ron has one son Cade currently attending St. Cloud State University.

Anita Harper, Customer Success Director, SSS

Anita Harper started with SSS after running the parent support line for over 10 years. In December of 2016, Anita stepped into the role of the National Director (Client Success) after initially joining SSS in December of 2014 as the Senior Client Success Associate. Her background in management and customer service allows her to provide top notch quality to all SSS Subscribing Schools. Anita transitioned to Community Brands via SSS in 2017 and her current CSM role solidifies what she has already been doing successfully through out the years. Add to this her ten-year career of managing the SSS parent support center, Anita's breadth of knowledge about the complete financial aid cycle is an asset to schools using the SSS School and Family Portals. She loves harnessing the SSS portals to empower schools to meet the needs of their families, their budget, and admission goals. This led her to play an integral role in the creation of the SSS Financial Aid Assistant (FAA) program to offer schools the support and expertise of SSS with applicant reviews. In 2019, Anita partnered with a Independent school in Philadelphia after being asked to join their Financial Aid Committee. Through SSS, FAA and her FA Committee experience, Anita is excited to help your school to be strategic with financial aid awarding and understand the full landscape of the families you serve.

Clint Losch, Financial Aid Specialist, ISM

Clint is a financial aid and tuition management specialist who has helped over 1000 school leaders discover how to set mission-appropriate financial aid policies to sustain long-term viability. As Regional Account Manager for ISM, Clint helps schools thrive by providing the tools to increase revenue and fill empty seats with mission-appropriate students; works side-by-side with schools to give them the confidence to make the best financial aid decisions for all parties involved; and supports school leaders in supporting and sustaining their own mission with customized aid recommendations. Clint previously served as a Financial Aid Advisor at The Wealth Advocate Investment Group LLC and a Financial Advisor at 1847Financial. He also owned his own marketing organization, Losch Marketing. Clint earned his bachelor's degree in math and economics at Lafayette College.

Matthew Richardson, Senior Vice President, FACTS

Matt Richardson is a Senior Vice President with FACTS Management Co. At FACTS Matt works closely with the FACTS Product and Development teams to introduce new and innovate products and tools that assist Private Schools manage and improve their Tuition Assistance process. Matt joined FACTS in 2017 with the merger of his company Private School Aid Service (PSAS). As a company PSAS provided specialized and custom Need Analysis and Scholarship Award Management Services to Private and Faith Based K-12 schools throughout the United States. As a principal and owner at PSAS for over 25 years, Matt has participated in the evolution of the Needs Analysis process in the United States and he understands the opportunities and challenges facing today's Financial Aid Administrators. When not working with Schools and Scholarship programs, Matt enjoys time boating on Lake Erie with family and service opportunities in his hometown of Medina Ohio.

Field of Study: Finance

Prerequisites: Basic knowledge of independent school finances

Advanced Preparation: None

Program Level: Update

Delivery Method: Group Live

Participants will earn 1 CPE credit.