

College Money Method

College Finance & Financial Aid Workshop for 9th

Intro to college financial aid and finding your financial fit

Given changes in college costs and financial aid over the past two decades, families enter high school with open questions about how to make college affordable. The good news: the financial aid system has broadened to include opportunities for families of all economic backgrounds. When you understand how the financial aid system works *early*, you have the time to prepare to take the best advantage of college aid opportunities. Some essential questions that need earlier answers include...

- Given our income and savings, are we eligible for financial aid?
- What are the different college financial aid policies, and how do they work for us?
- What should we consider now to prepare to pay for college?

This workshop gives students and their families an overview of how the financial aid system works and details both need-based and merit-based aid policies. It delivers the tools to understand their eligibility and find their financial match. You will learn about the best options to receive the most money to help pay for college.

Topics covered

The cost of college and your investment

How colleges evaluate your financial situation

- Student Aid Index (SAI) and Demonstrated Need
- How need-based eligibility is determined

Understanding a college's financial aid policy

- Important considerations for need-based financial aid
- Important considerations for merit-based financial aid
- Resources to research colleges' financial aid policies and practices

Putting it all together

- Finding your financial fit – college matches for all families
- Action steps for students and parents

Resources

- ⇒ **Guide to financial aid terminology:** a newbie's guide to key concepts and terms used by colleges and financial aid offices
- ⇒ **Getting started with your EFC:** workbook to explore your EFC and demonstrated need
- ⇒ **Colleges that meet 100% of need:** list of colleges that meet 100% of financial need, including those with no loan policies.

⇒ **College Common Data Set (CDS) spreadsheet:** List of 400+ colleges with key data points on need-based and merit-based awards

About the Facilitator

Paul Martin is the founder of College Money Method, a financial education service focused on helping students and families with college affordability and the financial aid process. A graduate of Harvard and MIT, his passion for this work stems from his own experience going through the process alone as a first-generation college student.

In partnership with Miami-Dade and Broward School Districts – the nation’s 4th and 6th largest, respectively – Paul has recorded district-wide trainings for counselors and workshops for students on financial aid and paying for college. He works with 18 independent schools in 10 states to offer his curriculum and advising to students of diverse economic backgrounds.

As a volunteer and service leader, Paul is a member of the National College Advocacy Group, a non-profit comprised of financial planners focusing on college access and affordability. He is also the President of First-Generation Harvard Alumni and the Founder of First-Generation Alumni of MIT, two organizations that offer mentorship to first-generation students as they trailblaze through college.

Contact information

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