

Benefits to Financial Planners, CPAs, Banks, & FCUs



In 2004 CAPlus became the national pioneer in the field of reducing the cost of college by effectively negotiating larger portions of the college endowment funds in undergrad, graduate, law and medical schools to reduce student debt, now for over 5500 families. This process is used not only in the original entry to college, but progressively throughout undergrad and graduate years to further reduce tuition. CAPlus also provides comprehensive academic and career planning throughout the process. We furnish unique and strongly attractational educational seminars and webinars at your location to provide financial literacy education, as well as continuing education credits to financial advisors and CPAs.

Since the beginning, College Assistance Plus has helped small and large national financial institutions deepen their client relationships and expand the footprint of their business. These have included financial advisors, credit unions, CPAs, and attorneys.

Benefits to Financial Advisors, CPAs, FCUs, and Banks:

- **Investments & Financial Planning**– Preserve significant amounts of assets under management, especially for mid and higher incomes, including grandparents. Increase sales of financial products, as we encourage financial advisor review annually while we review the FAFSA, and coach higher income clients on how to withhold the FAFSA to aid negotiation. CAPlus is especially helpful for mid and upper income families to substantially negotiate lower costs.
- **Increase Multi-Generational reach** – Grow your customer base. 20% of our clients are grandparents who want to do something more leveraged to assist their grandkids.
- **Opening Doors for you** – Add new clients. You will find that the very concept of a new way to get better deals at college piques people’s interest and they will tell their friends where they heard this.
- **Outreach seminars** – Team with CAPlus to conduct co-branded outreach seminars to bring new clients/members into your customer base with a novel and exciting idea to save money.
- **Increase fiduciary care and good will** – Clients appreciate learning about a new service which will help provide a good education for their loved ones while reducing expense and debt, as well as help with FAFSA, applications, and essays
- **Financial Literacy** – We provide college-related Financial Literacy training to dovetail with your programs.
- **Student Loans** – We bring you customers to increase this part of your business. (Including Student Choice, etc).
- **Personal Banking and Credit Unions** – Grow customer base through financial literacy college workshops and education to the public and in schools, meeting a very important family need.

*To learn more or arrange a meeting, please contact **John Decker** at **315-656-7973** or jdecker@CollegeAssistancePlus.com*