Society of FSP
Financial Service Professionals

Syllabus for Continuing Education Program

Program Provider: Society of Financial Service Professionals Twin Cities
(MN Dept. of Commerce Provider #8724)
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Program Title: **7 Insider Tips to Successfully Navigate the College Search Process & Save Money**

Speaker: Cozy Wittman
Education and Partner Manager
College Inside Track
237 Edgewood Ln., St. Paul, MN 55118
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Date: Thursday, April 5, 2018

Time: 11:00 AM Sign-in/Networking
11:15 AM Lunch Buffet Open
11:30 AM Chapter Business
12:00 PM – 1:30 PM Presentation

Location: **Midland Hills Country Club**
2001 Fulham Street
Roseville, MN 55113

CE Credits: This educational offering is APPROVED by the Minnesota Commissioner of Commerce as satisfying 1.5 hours of general classroom credit toward continuing insurance education requirements.
CFP: 1.5 hours APPROVED standard credits
CLE: 1.5 hours APPROVED standard credits
A certificate of attendance is available for individuals requesting CPE and PRP (Professional Recertification Program – formerly PACE) credits.

Who Should Attend: Estate planners, financial planners, investment advisors, insurance producers, retirement counselors, CPAs and JDs.

Educational Level: Overview

Course Description

Learn Insider tips to help your clients navigate the complicated college process, reduce stress, save significant money, and reduce the overall cost of college!

Advisors will not want to miss a national college search expert provide strategies to help families navigate the complicated college process and save tens of thousands of dollars.

College is now the second largest purchase most families make in their lives. This presentation will cover common mistakes families make in selecting a college, myths about financial aid, and strategies advisors can share to significantly reduce their clients overall college costs.

Planning ahead and developing a strategy for the college search is crucial to finding the right fit and avoiding unmanageable debt. A must for advisors with clients who have college bound students and grandchildren.

Learning Objectives

1. Common mistakes that families make in selecting colleges
2. Myths around financial aid
3. Strategies advisors can share to significantly reduce their clients' overall college cost

Outline:

1. Evolution of college cost from 30 years ago to today - 10 min
2. Kinds of Aid available to families
    a. Need based aid - 10
    b. Merit based aid - 20
3. Strategies to Reduce Cost - 30
4. Questions - 20

Total Time 90 Minutes

Instructional Materials for Students:

- PowerPoint in handout format

Examination & Answers:

- No exam