



## Consultation Invitation & Agenda

What we'll discuss during our one hour meeting:

1. **Purpose of the meeting:** Determine if there is a fit between your family and us & answer your preliminary questions.
2. **Two Ground Rules:**
  - We need to be totally open and honest with each other
  - It is ok for either of us to end the conversation at any time if we determine there is not a good fit.
3. **The Issues:**
  - Where are you NOW?

Academics	Extra-curriculars	Goals	Finances
Courses To Date	Athletics	Career	Savings
Grades	Leadership	Major	Funding Plan
Test Scores	Hook Development	Programs	Loans
Testing planned	Summer Camp	Colleges	Need Based Aid
Courses Planned	Work/Internship	Other	Merit Aid / Scholarships

- Where do you WANT to be? Why?
  - Where do you NEED to be? Why?
4. **Budget:**
    - What can you invest? When can you invest?
  5. **Decision Issues/Timeline:**
    - Your top 3 non-negotiable criteria when selecting a college prep partner.
    - How do you make decisions in your family?
    - When?
  6. **Proposed Solutions:**
    - How I work
      - One on One Consulting Services
      - One Time Services
      - Professional Services Agreement with Addendum
    - Pricing Options
      - One Time, Monthly, Project Based, Hourly (limited)
  7. **Next Step:**
    - Clearly identify and agree to the next step.
    - Decide there is no fit.

**To Schedule your meeting, text, call, or email Katherine.**

A one hour professional consultation is \$250. Ask about our 40% off special.

*Providing Expert Knowledge for the Journey to College Since 2004*

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