



Brian Safdari

Add an Extra Million Dollars in Revenue
with College Planning

TOP of the TABLE

ANNUAL MEETING 2017 | RANCHO PALOS VERDES • CALIFORNIA • USA

Afghanistan





Soccer Passion



Soccer Career

Club Soccer 10 years

Olympic Development Program 1996

Junior World Cup in France 98

4 Year Varsity High School Team

NCAA Division 1 at Cal State, University Northridge

Soccer Injury No Scholarship



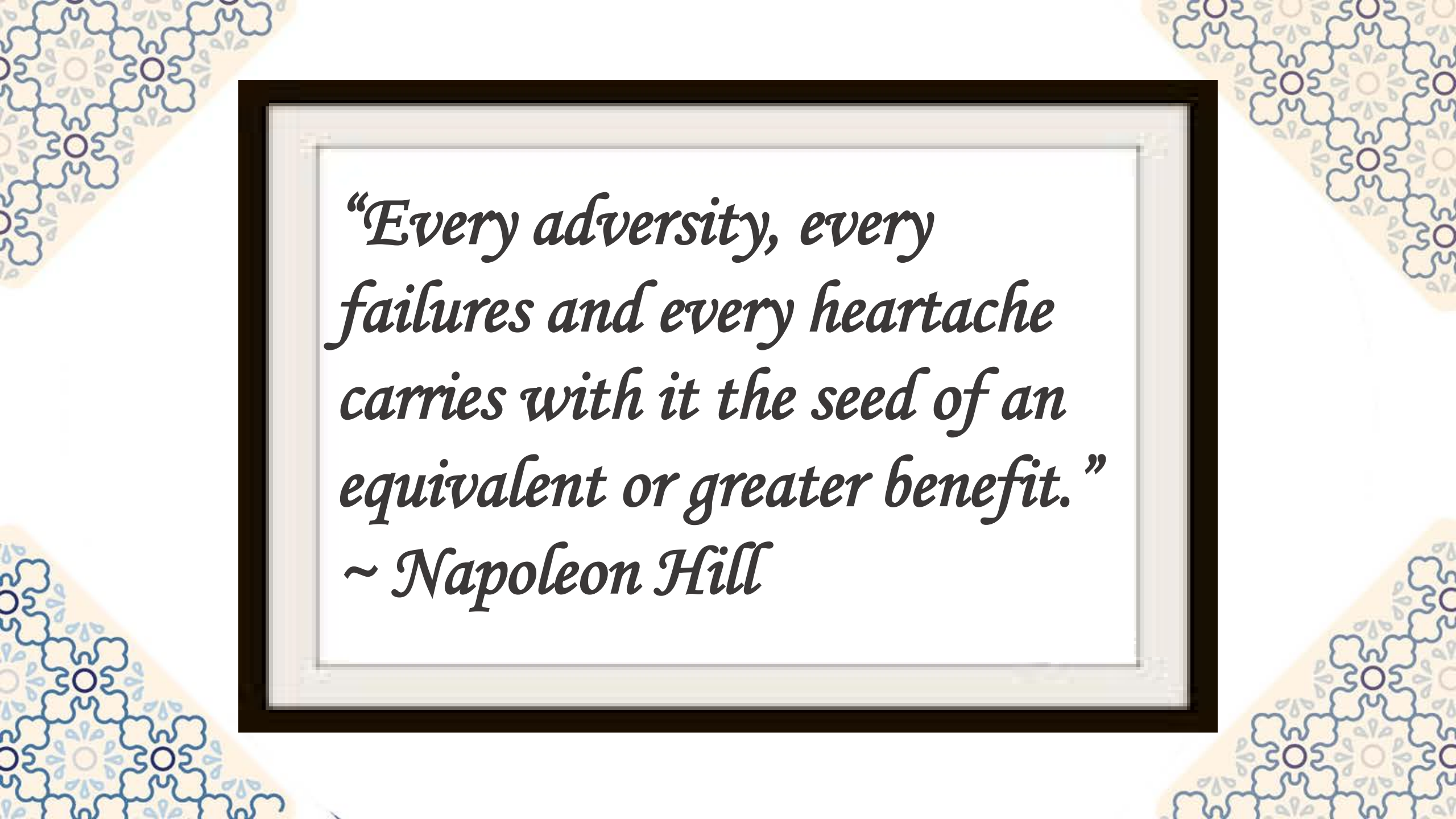
My College Planning Experience

College Dreams Shattered

Over \$53,000 in education debt


Made mistakes on the financial aid forms (FAFSA)

Spent 2 years paying college loans and studied the Higher Reauthorization Act (aka – US Education system)

The image features a central white rectangular area with a black border, containing a quote. The background is white with decorative floral patterns in the corners, consisting of blue and orange geometric shapes.

*“Every adversity, every
failures and every heartache
carries with it the seed of an
equivalent or greater benefit.”*

~ Napoleon Hill

The slide features decorative geometric patterns in the corners, consisting of repeating floral and circular motifs in blue and orange tones. The main text is centered and reads:

**Started CollegePlanningExperts.com,
America's leading authority on college admission
and funding in 2004**

- **Helped over 25,000 families worldwide**
- **Raised over \$250M in grants and scholarships**
- **Over \$10M a year in annuity business**
- **Over \$400k a year Target Premium using
Permanent Life Insurance**

Brian's Family



The slide features four decorative corner elements, each consisting of a light orange triangle with a blue and white floral pattern. The patterns are intricate, featuring stylized flowers and leaves. The main text is centered on a white background.

What is College Planning?

Helping a family send their child to their dream college while making it affordable

3 Big Benefits you are solving for College Bound Families

- 1. Get into the “right fit” college**
- 2. Maximize grants and financial aid**
- 3. Fund it**

The College Planning Fiasco

High School Counselors to Student ratio is 457-1 (NY Times)

Admissions acceptance percentages continue to decrease

**Financial aid (grants and scholarships) literacy at all time
low**

**Less than 5% of Financial advisors understand asset
planning for financial aid at colleges**

College Stats

50.7M children enrolled in K-12th in the US

15.1M will be 9th-12th grade (National Center for Education Statistics)

College Tuition has increased by 490% since 1980

65% of all jobs are going to college grads

College grad makes \$24,100 a year more than a high school graduate



Why Add College Planning to your Revenue?

You are making a difference in a Family's life

You help a family pay for college (Finance)

You gain their trust for life

You are seen as a "Specialist"

You get paid well





You attract middle to high income families

Clients have built-in urgency to move assets in order to qualify for grants and scholarships

You never lose a client to another financial planner

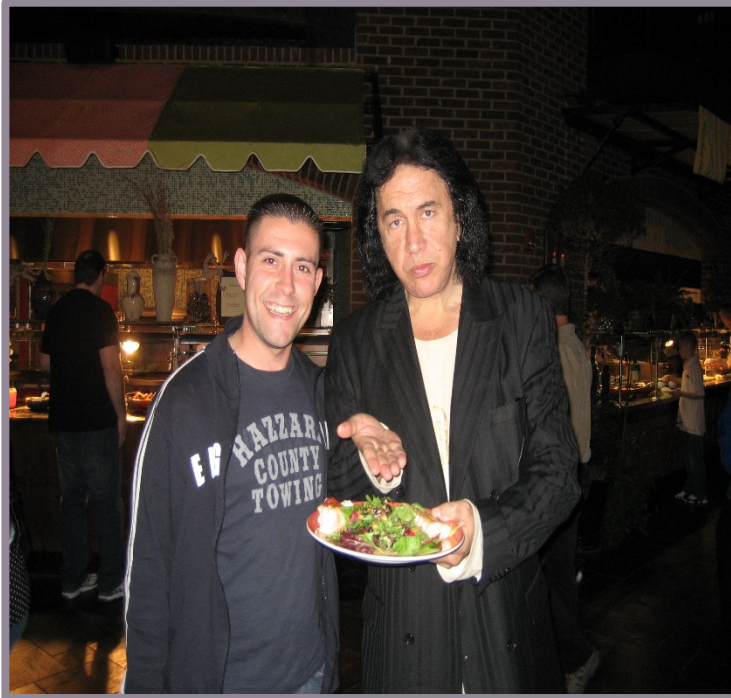
Multiple Streams of Income

Recession Proof

Unlimited referrals and lead generation to retirement planning



Brian with Celebrities...



Gene Simmons



Anthony Hopkins

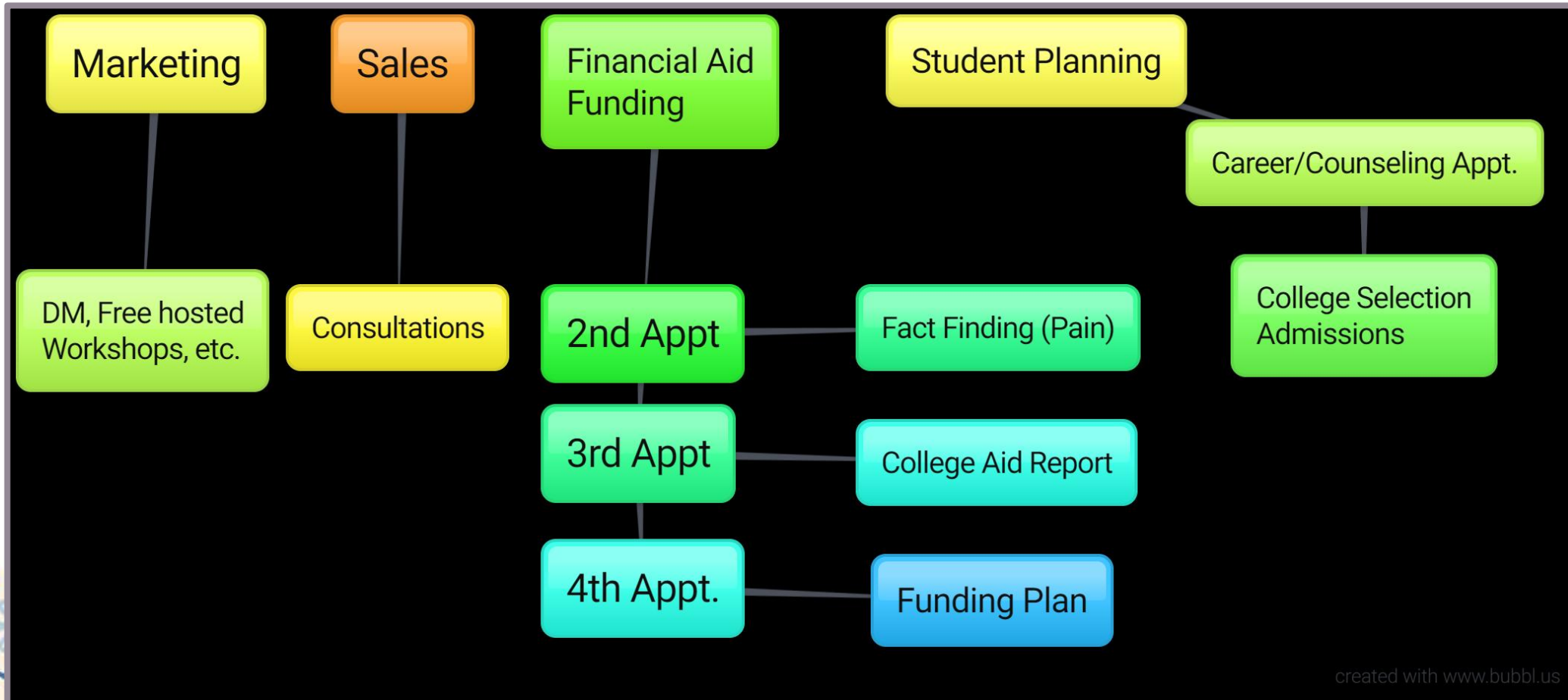
The image features a white background with four decorative corner elements. Each corner has a triangular section with a light orange background and a blue line-art floral pattern. The patterns consist of repeating circular and leaf-like motifs. The text is centered in the middle of the page.

The Million dollar College Planning Model on a napkin

7 step College Planning System

1. Prospect attends a workshop
2. Prospects comes in for an analysis (consultation)
3. Prospect Hires
4. Parents do “financial fact finding” appt. and student does “college admissions” appts. with counselor
5. Parents do “admissions/financial aid strategy session” appt.
6. Parents do “funding” appt
7. Parents come in for annual review

College Planning System Overview



4 Types of College Planning Prospects

- 1. High School Parents (9th to 12th grade)**
- 2. Community College Transfer Parents**
- 3. Middle school or younger Parents**
- 4. International Parents**



The Best Marketing Strategy to find the ideal prospects

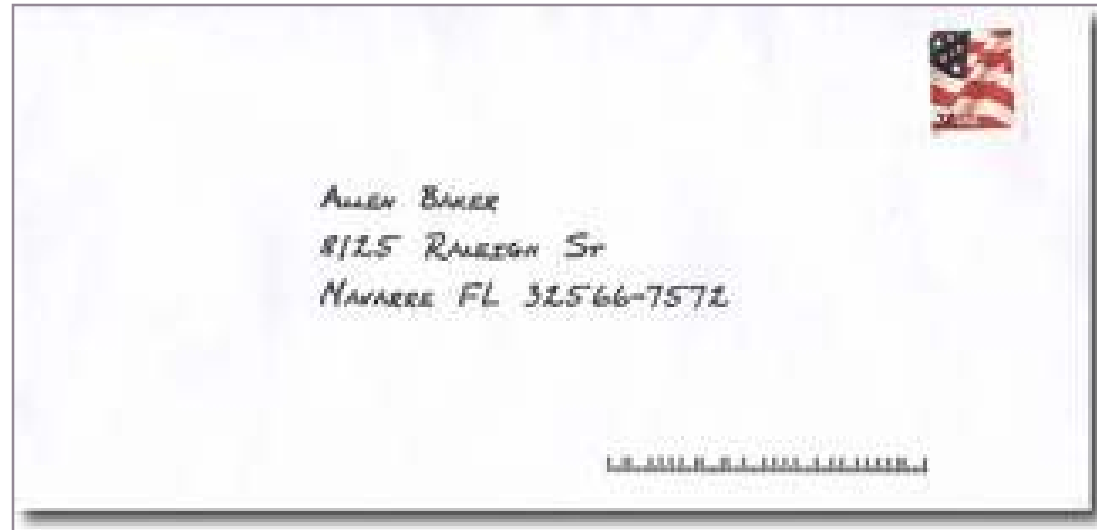
**Host FREE college admissions, financial aid,
and funding workshops**



The image features a white background with four decorative corner elements. Each corner is occupied by a triangular section of a repeating pattern. The pattern consists of stylized, interconnected floral or geometric shapes in a light blue color, set against a light orange or tan background. The overall aesthetic is clean and modern.

My best Marketing Flyers

Direct Mail Samples



Is the high cost of college causing you to lose sleep? Come learn how to...

Pay For College Without Going Broke!

If you're the parent of a high school student who's planning on attending a four-year state college or private university, you must attend one of these FREE workshops....

Come learn the insiders' secrets and strategies to send your child to schools you never thought you could afford.

Topics Include:

- How to send your child to the school of their dreams without getting trapped in a financial nightmare.
- How to double or triple your eligibility for free grant money.
- Do you think that you make too much money to qualify for aid? Think again, we'll explain the 7 most common financial aid myths and this is one of them.
- Where to find the hidden scholarships and grants other parents will never hear about.
- The single biggest mistake 9 out of 10 parents make when applying for scholarships that literally cost them *thousands* of dollars, and how to avoid it.
- Haven't saved enough to pay for college? Don't worry, it's not as bad as you think-if you know these 3 insider secrets.
- The shocking truth about the new college savings plans and how they can cost you money.
- Did your accountant or broker show you where to save money for school? Watch out! You better move it now before it costs you a fortune.

Here's what other parents have had to say about this class:

"Thank you! I don't feel as much of a victim now." Shawn M., Valencia

"As a guidance counselor, you really educated me and I thank you." Melanie C., Saugus

"It's refreshing to know that there is hope." Nancy P., Glendale

"I was so afraid because I had little to nothing saved Thank you for putting me at ease." Rachel M., Mission Hills

"Thanks for showing me that we qualify for aid in spite of my income." Roy N., Beverly Hills,

"This is an absolute class that all parents should attend whether they think their kids are college-bound or not." Pam C., Encino

Having this valuable information is like having a flashlight to explore a cave, while every other parent stumbles through blindly.

Free Workshop Dates

<i>Tues, Feb 20th, 2007 7:00 – 9:00 PM</i>	<i>Thurs, Feb 22nd, 2007 7:00- 9:00 PM</i>	<i>Sat, Feb 24th, 2007 10:30 – 12:30pm</i>
Canyon Country Activity Center	Westfield Mall in Valencia Town Center	Northridge Library

These classes will be taught by Brian Safdari, a well-known financial educator and guest speaker at various radio stations. This is not some lame investment seminar. Don't miss this opportunity to hear one of the nation's most knowledgeable speakers on paying for college.

Please call 661-295-9946, 24 Hours a day to reserve your seat(s).

Note: This workshop is 100% free, but is limited by the size of the rooms, so reserve your seats now! Call right now, while this is fresh in your mind.

Don't hate yourself for missing out on all the money you are eligible to get for college.

Post Card front side

How Your Student Can Get Thousands of Dollars of **FREE Money**, Regardless of Your Income, Assets or Their Grades!

Get \$7,500 - \$35,000 or more in Financial Aid, Grants & Scholarships per year **GUARENTEED!**

Parents of SCV High School Students who are thinking about attending a Community College or a 4 year University, **MUST** attend this **FREE Community Workshop**

We will reveal astonishing ways to beat the high cost of college that the colleges aren't telling you about. Parents across the country are saving 50-80% or more on college costs! In fact, parents who have attended our workshops have discovered strategies to send their children to schools they never thought they could afford.

Here's just part of what you will learn:

- > The 5 most common college planning myths, and why the advice of the other parents, guidance counselor or your accountant is the worst source of information on college planning...and will cost you a fortune!
- > What scams all parents of college bound students should be aware of and avoid.
- > How many parents of students with only average grades doubled or tripled their eligibility for FREE grant money and sent their children to great schools!
- > How even parents making \$100-500k income with millions in assets are also getting tens of thousands of free grant money (and how you can too).
- > How to get colleges to practically line up and beg you to attend their school.
- > How some parents put their kids through college, and end up in better financial shape than when they started, even though they hadn't saved a nickel for school.
- > How to avoid making The ONE single mistake 91% of all parents make that costs them thousands!
- > What to do right now if you haven't saved a single dime for college, or you haven't saved enough.
- > How to obtain a "Tax Scholarship" to pay for ALL tuition - right from the IRS. 100% legal, but one in 1,000 knows how to get it!

IMPORTANT: If you think or have been told your family makes too much money to get financial aid or reduced tuition, take the time to attend this FREE class to learn the shocking truth about how even families with incomes of \$100k-500k, right here in Santa Clarita, are getting tens of thousands of dollars of free money each year.

COC University Center

26455 Rockwell Cyn Rd, Santa Clarita CA 91355

50 17

SEATS LEFT

Thursday, July 15

6:30pm

50 27

SEATS LEFT

Saturday, July 17 & 24

10:30am

To Guarantee Your Seats, Please RSVP at www.CollegePlanningExperts.com or at 661-295-9946

These classes will be taught by **Brian Safdari**, Certified College Planner, well-known financial educator, and host of Santa Clarita's only College Planning radio show on AM 1220 KHTS and author of "How to get free money for college." This is not an investment seminar and nothing will be sold. Don't miss this opportunity to hear one of the nation's most knowledgeable speakers on paying for college. This workshop has been rated #1 in Southern California by Counselors, Admissions Officers, and Financial Aid Officers.

Post card back side

Here's what some parents have had to say about this College Planning Workshop:

"Feeling encouraged that we can get our kids to college."
- **Christina & Chris, Valencia**

"I liked the tools that were given on how to plan." I would tell other families "get informed and educated because it's a lot of information you need to know!" -**Anna & Ezequiel, San Fernando**

Brian's workshop was *"a great overview"*. I would tell other families *"there is a lot of info you just don't know."* - **Julie & Michael, Northridge**

"I learned how private schools actually end up being cheaper than state schools." - **Fernando, Van Nuys**

"I've attended 3 college workshops and this was by far the best one."
- **Maria, North Hills**

"It helped me relieve the stress and fog that surrounds the process that is so overwhelming." - **Mimi, Santa Clarita**

"This workshop was very empowering. It made paying for college seem achievable." - **Andrew, Santa Clarita**

Don't hate yourself for not getting valuable information that can save you an absolute fortune. Call 661-295-9946 to reserve your seat TODAY!

25115 Ave Stanford B250
Valencia, CA 91355

Award letter Sample

Stanford | Financial Aid

March 25, 2016
Original

2016-2017

Cost of Attendance:

The budget includes the actual cost of tuition and certain fees, and a standard amount for housing and meals. Allowances for the typical costs of books and supplies, personal expenses, and transportation to and from campus are estimates of your actual expenses and included for the purpose of determining the full cost of attendance and eligibility for aid.

Tuition	\$47,331
Room and Board	\$14,601
Campus Health Service Fee	\$609
New Student Fees	\$688
Personal Expenses	\$2,700
Books and Supplies	\$1,455
Travel-USA	\$405

Total Expenses	\$67,789
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Scholarships and Grants:

This is gift aid that does not have to be paid back. Aid from Stanford is awarded based on our calculation of your need. If information is still required, these awards are estimates and may change. Details regarding quarterly amounts can be found at axess.stanford.edu.

Stanford Resources	
Stanford Fund Scholarship	\$32,141
Federal/State Resources	
Outside Resources	

Total Grants and Scholarships	\$32,141
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Net Cost to you:

Net Cost is Cost of Attendance minus Scholarships and Grants. Additional resources listed below may be available to help you with the Net Cost.

Total Net Cost	\$35,648
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Parent Contribution:

Calculated amount based on information provided on your financial aid application and a standard formula.

Parent Contribution	\$30,648
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Student Responsibility:

You are expected to contribute through summer earnings and assets as well as earnings during the academic year. For information about applying for jobs on campus see financialaid.stanford.edu/aid/employ. You may also meet your student responsibility through outside scholarships and/or student loans.

Student Contribution	\$2,200
Academic Year Job Earnings	\$2,800

Loan Programs:

Student or Parent loans may be available to help finance your Net Cost. You may be eligible for additional loans; see details about loan eligibility and processing instructions at financialaid.stanford.edu/loans. Your total student indebtedness at Stanford: **\$0** (excluding loans not yet accepted)

Top 4 Ways to Get a Workshop

- 1. High School Coaches, PTAs, Booster Clubs**
- 2. Social Media**
- 3. Corporations (b2b)**
- 4. Referrals (family, friends, business colleagues)**

My 3 step Sales System

Host a Free Workshop (education session)

Offer a \$97 College Planning Analysis (consultation)

Offer a College Planning program (\$2,500 - \$10,000)

3 College Planning Models

- 1. College Planning Office**
- 2. College Planning Specialist (independent)**
- 3. College Planning Ambassador (affiliate)**



#1 Mistake to avoid in the College Planning biz

**Spending too much time learning the college
admissions and financial aid process**



The Million Dollar College Planning System

Marketing/Sales (consultations) - Advisor

New Hire Process (Orientation) - Advisor

Student Planning - CPE Counselor

Appointment (fact finding) - Advisor

Financial aid Strategies appt - CPE

Funding appt - Advisor and CPE Funding Specialist

How to quickly and easily add College Planning to your business

Follow a system that works

Select the College Planning Model that fits you best

Follow the training model

Implement Fast (Practice)

CollegePro Training Available

Webinars

Videos

1-3 day Live Training

Split Case Programs

Mastermind and Coaching

Since 2010, Brian has trained over 250 CPAs, Financial planners, Insurance agents, Broker dealers, IMOs, insurance carriers, CFPs, and Educational Consultants in the College Planning and Financial Planning Industry.



For More Information contact:

Brian Safdari, President of College Planning Experts



Thank you



MDRT

The Premier Association of
Financial Professionals®

