



# College Aid Pro™ Reports for Sample Financial Aid Analysis

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Know Before You Go!



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# Schools for Sample Financial Aid Analysis

Base Scenario



## California State Polytechnic University, Pomona



3801 West Temple Avenue  
Pomona, CA 91768-2557 USA

Common App: No  
Test Optional: Yes  
Forbes Ranking: #103  
US News Ranking: Regional Universities West - #14  
Money Ranking: #15  
Undergraduate Enrollment: 27,911  
Percent Admitted: 65%  
Graduation Rate: 30%  
Undergraduate Majors: 55

EFC Basis: Federal (FAFSA)  
Total Need Met: 54%  
% Receiving Non-Need Merit: 0%  
Average Non-Need Merit: \$531  
Endowment Per Student: \$3,550

Major Group: Business  
Year 1 Salary: \$53,590  
Year 5 Salary: \$65,720  
Year 10 Salary: \$88,560  
Funding Gap (Loans): \$25,443  
Affordability Profile: Great

In-State Tuition	Out-of-State Tuition	Private Tuition	Fees	Room and Board	Book Fees	Travel/Misc
\$7,438	\$19,318	-	-	\$16,570	\$1,022	\$3,152

Freshman GPA	SAT Verbal 75	SAT Verbal 25	SAT Math 75	SAT Math 25	ACT 75	ACT 25
3.57	620	510	640	510	27	19

Award	Type	Amount	Requirements	Notes
Out-of-State Offset	Out-of-State Offset	\$11,880		Offset the difference between out-of-state tuition (\$19,318) and in-state tuition (\$7,438).
<a href="#">Cal Grant B</a>	State - Need	\$7,390 to \$14,218	GPA 2.00 Unweighted GPA In State	Deadline March 2nd. For low income students 2.00 high school GPA minimum May be used for a program that is at least one academic year in length resulting in an associate, baccalaureate degree or certificate of at least 24 semester units or the( <a href="#">more</a> )
<a href="#">Cal Grant Competitive Awards</a>	State - Need	\$5,742 to \$14,218	GPA 2.00 Unweighted GPA In State	Deadline March 2nd. This is a competitive award and limited to 13,000 awards each academic year. To be

# Schools for Sample Financial Aid Analysis



## Base Scenario

				considered for the award, you must meet the general Cal Grant eligibility requirements and complete a FAFSA or CA Dream Act Application. Only <a href="#">(more)</a>
<a href="#">Cal Grant A</a>	State - Need	\$5,742 to \$12,570	GPA 3.00 Unweighted GPA In State	Deadline March 2nd. For low to middle income students 3.00 high school GPA minimum May be used for a program that is at least two academic years in length resulting in an associate or baccalaureate degree of 48 semester units or the equivalent <a href="#">(more)</a>
<a href="#">Western Undergraduate Exchange Program</a>	Semi-Automatic	\$9,008	Out of State - WUE? States	Deadline January 1st. Cal Poly Pomona applicants who are residents of Western Interstate Commission for Higher Education (WICHE) states are automatically considered for WUE. No additional application is necessary. Award recipients are selected <a href="#">(more)</a>
Average Non-Need Merit Award	College Average	\$531		
<a href="#">Cal Poly Pomona Alumni Association Scholarships</a>	Competitive	-	SAT 1400 ACT 30 GPA 3.00 Unweighted GPA In-State Out-of-State	Deadline March 2nd. The Alumni Association awards over \$35,000 in scholarships annually. The number of scholarships grow as our membership increases.
<a href="#">College of Business Administration Scholarship</a>	Competitive	-	SAT 1400 ACT 30 GPA 3.00 Unweighted GPA In-State Out-of-State	Deadline March 2nd. Business majors only. The College of Business Administration Scholarship Committee selects scholarship recipients through a competitive process. Many of CBA scholarships have specific requirements in addition to merit and/or <a href="#">(more)</a>
<a href="#">College of Science Scholarships</a>	Competitive	-	SAT 1400 ACT 30 GPA 3.00 Unweighted GPA In-State Out-of-State	Deadline January 1st. Sciences majors only. College of Science Scholarships.

# Schools for Sample Financial Aid Analysis

Base Scenario



## Occidental College



1600 Campus Road  
Los Angeles, CA 90041-3314 USA

Common App: Yes  
Test Optional: Yes  
Forbes Ranking: #160  
US News Ranking: National Liberal Arts Colleges - #42  
Money Ranking: #416  
Undergraduate Enrollment: 1,839  
Percent Admitted: 41%  
Graduation Rate: 78%  
Undergraduate Majors: 33

Early Decision Date: November 15th  
Financial Aid Deadline: January 10th

EFC Basis: Institutional (IM)

Total Need Met: 100%  
% Receiving Non-Need Merit: 14%  
Average Non-Need Merit: \$14,509  
Endowment Per Student: \$205,215

Major Group: Business  
Year 1 Salary: \$59,960  
Year 5 Salary: \$74,873  
Year 10 Salary: \$99,080  
Funding Gap (Loans): \$82,092  
Affordability Profile: Caution

In-State Tuition	Out-of-State Tuition	Private Tuition	Fees	Room and Board	Book Fees	Travel/Misc
-	-	\$56,576	-	\$16,600	\$1,240	\$2,750

Freshman GPA	SAT Verbal 75	SAT Verbal 25	SAT Math 75	SAT Math 25	ACT 75	ACT 25
3.62	730	640	730	630	33	28

Award	Type	Amount	Requirements	Notes
<a href="#">Barack Obama Scholars Program</a>	Competitive	\$73,176	SAT 1490 ACT 33 GPA 3.80 Unweighted GPA In-State Out-of-State	Deadline January 10th. The Barack Obama Scholars Program awards a four-year scholarship to top students who are committed to the public good. Obama Scholars receive a loan-free financial aid package that covers tuition, room and board, books, <a href="#">(more)</a>
<a href="#">Centennial Scholarships for Los Angeles High School Students</a>	Competitive	\$73,176	SAT 1490 ACT 33 GPA 3.80 Unweighted GPA In State - Los Angeles	Deadline January 10th. Centennial Scholarships can be awarded to one student from each of the following Los Angeles high schools: Eagle Rock Senior, Benjamin Franklin, James A. Garfield, and Theodore Roosevelt. This scholarship is

# Schools for Sample Financial Aid Analysis



## Base Scenario

				awarded to <a href="#">(more)</a>
<a href="#">Margaret Bundy Scott Scholarships</a>	Semi-Automatic	\$30,000	SAT 1490 ACT 33 GPA 3.80 Unweighted GPA In-State Out-of-State	Deadline January 10th. Margaret Bundy Scott Scholarships are awarded in the amount of \$30,000 per year and are renewable for three additional years (for a total of \$120,000), provided the student maintains a cumulative grade point average of <a href="#">(more)</a>
<a href="#">Antoinette and Vincent Dungan Merit Scholarship</a>	Competitive	\$25,000	SAT 1490 ACT 33 GPA 3.80 Unweighted GPA In-State Out-of-State	Deadline January 10th. The Antoinette and Vincent Dungan Merit Scholarship is awarded in the amount of \$25,000 per year and is renewable for three additional years (for a total of \$100,000). The Dungan Merit Scholarship was established in 2013 <a href="#">(more)</a>
<a href="#">President's Scholarships</a>	Semi-Automatic	\$20,000	SAT 1450 ACT 32 GPA 3.70 Unweighted GPA In-State Out-of-State	Deadline January 10th. President's Scholarships are awarded in the amount of \$20,000 per year and are renewable for three additional years (for a total of \$80,000), provided the student maintains a cumulative grade point average of 3.0. For <a href="#">(more)</a>
<a href="#">Leadership Scholarships</a>	Semi-Automatic	\$17,500	SAT 1420 ACT 31 GPA 3.70 Unweighted GPA In-State Out-of-State	Deadline January 10th. Leadership Scholarships are awarded in the amount of \$17,500 per year and are renewable for three additional years (for a total of \$70,000), provided the student maintains a cumulative grade point average of 3.0. For <a href="#">(more)</a>
<a href="#">Trustee Scholarships</a>	Semi-Automatic	\$15,000	SAT 1390 ACT 30 GPA 3.60 Unweighted GPA In-State Out-of-State	Deadline January 10th. Trustee Scholarships are awarded in the amount of \$15,000 per year and are renewable for three additional years (for a total of \$60,000), provided the student maintains a cumulative grade point average of 3.0. For <a href="#">(more)</a>
<a href="#">Community Impact Scholarships</a>	Semi-Automatic	\$15,000	SAT 1310 ACT 28 GPA 3.50 Unweighted GPA In-State Out-of-State	Deadline January 10th. Community Impact Scholarships are awarded in the amount of \$15,000 per year and are renewable for three additional years (for a total of \$60,000), provided the student maintains a cumulative grade point average of 3.0. <a href="#">(more)</a>
Average Non-Need Merit Award	College Average	\$14,509		
<a href="#">Cal Grant B</a>	State - Need	\$7,390 to \$14,218	GPA 2.00 Unweighted GPA In State	Deadline March 2nd. For low income students 2.00 high school GPA minimum May be used for a program that is at least one academic year in length resulting in

# Schools for Sample Financial Aid Analysis



## Base Scenario

				an associate, baccalaureate degree or certificate of at least 24 semester units or the <a href="#">(more)</a>
<a href="#">Honors Scholarships</a>	Semi-Automatic	\$10,000	SAT 1350 ACT 29 GPA 3.50 Unweighted GPA In-State Out-of-State	Deadline January 10th. Honors Scholarships are awarded in the amount of \$10,000 per year and are renewable for three additional years (for a total of \$40,000), provided the student maintains satisfactory academic progress.
<a href="#">Cal Grant Competitive Awards</a>	State - Need	\$5,742 to \$14,218	GPA 2.00 Unweighted GPA In State	Deadline March 2nd. This is a competitive award and limited to 13,000 awards each academic year. To be considered for the award, you must meet the general Cal Grant eligibility requirements and complete a FAFSA or CA Dream Act Application. Only <a href="#">(more)</a>
<a href="#">Cal Grant A</a>	State - Need	\$5,742 to \$12,570	GPA 3.00 Unweighted GPA In State	Deadline March 2nd. For low to middle income students 3.00 high school GPA minimum May be used for a program that is at least two academic years in length resulting in an associate or baccalaureate degree of 48 semester units or the equivalent <a href="#">(more)</a>
<a href="#">National Merit Scholarships</a>	National Merit/Achievement	\$500 to \$2,000	In-State Out-of-State	Deadline January 10th. National Merit Scholarships are awarded to honor scholastically talented high school students through an annual competition. To be considered for the award, students must have taken the Preliminary Scholastic Aptitude <a href="#">(more)</a>

# Schools for Sample Financial Aid Analysis

Base Scenario



## University of California, Santa Barbara



Financial Aid Deadline: June 15th

EFC Basis: Federal (FAFSA)

Financial Aid Priority: March 2nd

Total Need Met: 73%

% Receiving Non-Need Merit: 2%

Average Non-Need Merit: \$12,330

Endowment Per Student: \$8,057

1210 Cheadle Hall  
Santa Barbara, CA 93106-2014 USA

Common App: No  
Test Optional: Yes  
Forbes Ranking: #39  
US News Ranking: National Universities - #28  
Money Ranking: #55  
Undergraduate Enrollment: 23,196  
Percent Admitted: 37%  
Graduation Rate: 69%  
Undergraduate Majors: 74

Major Group: Business  
Year 1 Salary: \$58,880  
Year 5 Salary: \$70,350  
Year 10 Salary: \$97,300  
Funding Gap (Loans): \$29,228  
Affordability Profile: Good

In-State Tuition	Out-of-State Tuition	Private Tuition	Fees	Room and Board	Book Fees	Travel/Misc
\$14,442	\$44,196	-	-	\$16,061	\$1,317	\$5,595

Freshman GPA	SAT Verbal 75	SAT Verbal 25	SAT Math 75	SAT Math 25	ACT 75	ACT 25
4.17	710	620	770	610	33	25

Award	Type	Amount	Requirements	Notes
Out-of-State Offset	Out-of-State Offset	\$29,754		Offset the difference between out-of-state tuition (\$44,196) and in-state tuition (\$14,442).
Average Non-Need Merit Award	College Average	\$12,330		
<a href="#">Cal Grant B</a>	State - Need	\$7,390 to \$14,218	GPA 2.00 Unweighted GPA In State	Deadline March 2nd. For low income students 2.00 high school GPA minimum May be used for a program that is at least one academic year in length resulting in an associate, baccalaureate degree or certificate of at least 24 semester units or the <a href="#">(more)</a>



# Schools for Sample Financial Aid Analysis



## Base Scenario

<a href="#">Cal Grant Competitive Awards</a>	State - Need	\$5,742 to \$14,218	GPA 2.00 Unweighted GPA In State	Deadline March 2nd. This is a competitive award and limited to 13,000 awards each academic year. To be considered for the award, you must meet the general Cal Grant eligibility requirements and complete a FAFSA or CA Dream Act Application. Only <a href="#">(more)</a>
<a href="#">Cal Grant A</a>	State - Need	\$5,742 to \$12,570	GPA 3.00 Unweighted GPA In State	Deadline March 2nd. For low to middle income students 3.00 high school GPA minimum May be used for a program that is at least two academic years in length resulting in an associate or baccalaureate degree of 48 semester units or the equivalent <a href="#">(more)</a>
<a href="#">Regents Scholars</a>	Competitive	\$6,000	SAT 1490 ACT 33 GPA 3.80 Unweighted GPA In-State Out-of-State Int'l Students	Deadline March 2nd. The Regents Scholars selection committee conducts a comprehensive review of the applicant pool to determine the student's strength and breadth of academic preparation. Selection is based on a thorough review of the <a href="#">(more)</a>
<a href="#">Middle Class Scholarship</a>	Competitive	\$1,310 to \$5,241	In State	Deadline March 2nd. The Middle Class Scholarship (MCS) provides undergraduate students, including students pursuing a teaching credential, with family income up to \$191,000 and assets up to \$191,000 a scholarship to attend University of <a href="#">(more)</a>

# Schools for Sample Financial Aid Analysis

Base Scenario



## Whitman College



WHITMAN  
COLLEGE

345 Boyer Avenue  
Walla Walla, WA 99362-2083 USA

Common App: Yes  
 Test Optional: Yes  
 Forbes Ranking: #216  
 US News Ranking: National Liberal Arts Colleges - #38  
 Money Ranking: #387  
 Undergraduate Enrollment: 1,364  
 Percent Admitted: 54%  
 Graduation Rate: 79%  
 Undergraduate Majors: 54

Early Decision Date: November 15th  
 Financial Aid Deadline: January 15th

EFC Basis: Institutional (IM)  
 Financial Aid Priority: November 15th

Total Need Met: 94%  
 % Receiving Non-Need Merit: 40%  
 Average Non-Need Merit: \$16,488  
 Endowment Per Student: \$352,615

Major Group: Business  
 Year 1 Salary: \$54,520  
 Year 5 Salary: \$66,540  
 Year 10 Salary: \$90,100  
 Funding Gap (Loans): \$23,691  
 Affordability Profile: Great

In-State Tuition	Out-of-State Tuition	Private Tuition	Fees	Room and Board	Book Fees	Travel/Misc
-	-	\$55,982	-	\$13,800	\$1,400	-

Freshman GPA	SAT Verbal 75	SAT Verbal 25	SAT Math 75	SAT Math 25	ACT 75	ACT 25
3.70	710	620	720	610	33	29

Award	Type	Amount	Requirements	Notes
<a href="#">Eells Scholarship</a>	Competitive	\$55,560	SAT 1490 ACT 33 GPA 3.80 Unweighted GPA In-State Out-of-State	Deadline November 15th. The Eells scholarship is awarded to an entering scholar who has financial need and demonstrates high academic achievement as well as some talent in the fine or performing arts or humanities. The Eells scholarship covers <a href="#">(more)</a> .
Average Non-Need Merit Award	College Average	\$16,488		
<a href="#">Merit Scholarship</a>	Automatic	\$14,000	GPA 4.00 Unweighted GPA In-State	Deadline November 15th. Merit Scholarship.

# Schools for Sample Financial Aid Analysis



## Base Scenario

			Out-of-State	
<a href="#">Merit Scholarship</a>	Automatic	\$14,000	SAT 1450 ACT 33 GPA 3.80 Unweighted GPA In-State Out-of-State	Deadline November 15th. Merit Scholarship.
<a href="#">Merit Scholarship</a>	Automatic	\$12,000	GPA 3.70 Unweighted GPA In-State Out-of-State	Deadline November 15th. Merit Scholarship.
<a href="#">Merit Scholarship</a>	Automatic	\$12,000	SAT 1450 ACT 33 GPA 2.00 Unweighted GPA In-State Out-of-State	Deadline November 15th. Merit Scholarship.
<a href="#">Merit Scholarship</a>	Automatic	\$5,500	GPA 2.00 Unweighted GPA In-State Out-of-State	Deadline November 15th. Merit Scholarship.
<a href="#">Whitman Merit Scholarships</a>	Competitive	-	SAT 1490 ACT 33 GPA 3.80 Unweighted GPA In-State Out-of-State	Deadline November 15th. Whitman awards four-year renewable merit-based scholarships of up to \$20,000 to entering students who have excelled academically. Once you are awarded a merit scholarship you will continue to receive the same merit( <a href="#">more</a> )
<a href="#">Garrett Sherwood Scholarships</a>	Competitive	-	SAT 1490 ACT 33 GPA 3.50 Unweighted GPA In-State Out-of-State	Deadline November 15th. The Garrett Sherwood Scholarships are awarded by Whitman to exceptional applicants who exhibit outstanding academic achievement, leadership and contributions to their schools and communities. While at Whitman, Garrett( <a href="#">more</a> )
<a href="#">Campbell Music Scholarships</a>	Talent	-	In-State Out-of-State Audition Required	Deadline January 17th. Campbell Music Scholarships are awarded to students who demonstrate outstanding musical talent, regardless of what they intend to major in at Whitman.
<a href="#">Higley Scholarship</a>	Talent	-	In-State Out-of-State Audition Required	Deadline January 17th. Arts majors only. The Higley Music Scholarship is a prestigious award that is offered to a few students who declare in writing at the time of acceptance their intention of becoming a music major (which does not exclude( <a href="#">more</a> ))

# Schools for Sample Financial Aid Analysis

## Base Scenario



<a href="#">President's Scholarship in Debate</a>	Talent	-	In-State Out-of-State	Deadline February 10th. Students interested in participating in Whitman's renowned debate program are encouraged to apply for the President's Scholarship in Debate through the applicant portal. All students are invited to apply, regardless of <a href="#">(more)</a>
<a href="#">President's Scholarship in Fine Arts</a>	Talent	-	In-State Out-of-State Portfolio Required	Deadline February 1st. If you have exceptional talent, experience and demonstrated skill in art and intend to at least minor in art, we invite you to apply for a President's Scholarship in Fine Arts. This application requires a 10-piece <a href="#">(more)</a>
<a href="#">President's Scholarship in Theatre and Dance</a>	Talent	-	In-State Out-of-State Interview Required Audition Required	Deadline January 25th. The Department of Theatre and Dance offers scholarships for students interested in acting, dance, design, directing, playwriting, stage management and technical theatre. This award requires an on-campus or recorded <a href="#">(more)</a>

# How to Pay for Sample Financial Aid Analysis

## Base Scenario



### How to Pay: California State Polytechnic University, Pomona

<b>\$25,443</b> Total Loans at California State Polytechnic University, Pomona: Great	<b>\$282/m</b> Total Repayment for 10-year plan, \$33,896	<b>\$164/m</b> Total Repayment for 25-year plan, \$49,179	<b>\$3,126/m</b> Estimated Monthly Take-Home Pay for Business
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	'23/'24	'24/'25	'25/'26	'26/'27	Total
Tuition	\$7,661	\$7,891	\$8,128	\$8,372	\$32,052
Room and Board	\$17,067	\$17,579	\$18,106	\$18,649	\$71,401
Books and Supplies	\$1,053	\$1,085	\$1,118	\$1,152	\$4,408
Travel and Misc	\$3,247	\$3,344	\$3,444	\$3,547	\$13,582
Other Fees					
Cost of Attendance	\$29,028	\$29,899	\$30,796	\$31,720	\$121,443
Need Based Grants					
Merit Scholarship					
Private Scholarships					
<b>Net Cost</b>	\$29,028	\$29,899	\$30,796	\$31,720	\$121,443
Total 529 Savings Plan (start of college)					
Parent Pledged Assets	\$24,000	\$24,000	\$24,000	\$24,000	\$96,000
Parent Pledged Monthly Cash Flow					
American Opportunity Tax Credit					
Student Pledged Assets					
Student Pledged Monthly Cash Flow					
Grandparent and Other Help					
<b>Pre-Approval Amount</b>	\$24,000	\$24,000	\$24,000	\$24,000	\$96,000
<b>Funding Gap</b>	\$5,028	\$5,899	\$6,796	\$7,720	\$25,443
Federal Direct Student Loan	\$5,500	\$6,500	\$7,500	\$7,500	\$27,000
Private Student Loan					
Federal Direct Parent Plus Loan					
HELOC/Other Loans					
<b>Loan Total</b>	\$5,500	\$6,500	\$7,500	\$7,500	\$27,000
<b>Remaining Funding Gap</b>	-\$472	-\$601	-\$704	\$220	-\$1,557

# How to Pay for Sample Financial Aid Analysis

## Base Scenario



### How to Pay: Occidental College

<b>\$82,092</b> Total Loans at Occidental College: Caution	<b>\$911/m</b> Total Repayment for 10-year plan, \$109,367	<b>\$529/m</b> Total Repayment for 25-year plan, \$158,676	<b>\$3,498/m</b> Estimated Monthly Take-Home Pay for Business
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	'23/'24	'24/'25	'25/'26	'26/'27	Total
Tuition	\$58,273	\$60,021	\$61,822	\$63,677	\$243,793
Room and Board	\$17,098	\$17,611	\$18,139	\$18,683	\$71,531
Books and Supplies	\$1,277	\$1,315	\$1,354	\$1,395	\$5,341
Travel and Misc	\$2,833	\$2,918	\$3,006	\$3,096	\$11,853
Other Fees					
Cost of Attendance	\$79,481	\$81,865	\$84,321	\$86,851	\$332,518
Need Based Grants	\$36,085	\$37,289	\$39,426	\$41,626	\$154,426
Merit Scholarship					
Private Scholarships					
<b>Net Cost</b>	\$43,396	\$44,576	\$44,895	\$45,225	\$178,092
Total 529 Savings Plan (start of college)					
Parent Pledged Assets	\$24,000	\$24,000	\$24,000	\$24,000	\$96,000
Parent Pledged Monthly Cash Flow					
American Opportunity Tax Credit					
Student Pledged Assets					
Student Pledged Monthly Cash Flow					
Grandparent and Other Help					
<b>Pre-Approval Amount</b>	\$24,000	\$24,000	\$24,000	\$24,000	\$96,000
<b>Funding Gap</b>	\$19,396	\$20,576	\$20,895	\$21,225	\$82,092
Federal Direct Student Loan	\$5,500	\$6,500	\$7,500	\$7,500	\$27,000
Private Student Loan					
Federal Direct Parent Plus Loan					
HELOC/Other Loans					
<b>Loan Total</b>	\$5,500	\$6,500	\$7,500	\$7,500	\$27,000
<b>Remaining Funding Gap</b>	\$13,896	\$14,076	\$13,395	\$13,725	\$55,092

# How to Pay for Sample Financial Aid Analysis

## Base Scenario



### How to Pay: University of California, Santa Barbara

<b>\$29,228</b> Total Loans at University of California, Santa Barbara: Good	<b>\$324/m</b> Total Repayment for 10-year plan, \$38,939	<b>\$188/m</b> Total Repayment for 25-year plan, \$56,495	<b>\$3,435/m</b> Estimated Monthly Take-Home Pay for Business
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	'23/'24	'24/'25	'25/'26	'26/'27	Total
Tuition	\$14,875	\$15,321	\$15,781	\$16,254	\$62,231
Room and Board	\$16,543	\$17,039	\$17,550	\$18,077	\$69,209
Books and Supplies	\$1,357	\$1,398	\$1,440	\$1,483	\$5,678
Travel and Misc	\$5,763	\$5,936	\$6,114	\$6,297	\$24,110
Other Fees					
Cost of Attendance	\$38,538	\$39,694	\$40,885	\$42,111	\$161,228
Need Based Grants	\$9,000	\$9,000	\$9,000	\$9,000	\$36,000
Merit Scholarship					
Private Scholarships					
<b>Net Cost</b>	\$29,538	\$30,694	\$31,885	\$33,111	\$125,228
Total 529 Savings Plan (start of college)					
Parent Pledged Assets	\$24,000	\$24,000	\$24,000	\$24,000	\$96,000
Parent Pledged Monthly Cash Flow					
American Opportunity Tax Credit					
Student Pledged Assets					
Student Pledged Monthly Cash Flow					
Grandparent and Other Help					
<b>Pre-Approval Amount</b>	\$24,000	\$24,000	\$24,000	\$24,000	\$96,000
<b>Funding Gap</b>	\$5,538	\$6,694	\$7,885	\$9,111	\$29,228
Federal Direct Student Loan	\$5,500	\$6,500	\$7,500	\$7,500	\$27,000
Private Student Loan					
Federal Direct Parent Plus Loan					
HELOC/Other Loans					
<b>Loan Total</b>	\$5,500	\$6,500	\$7,500	\$7,500	\$27,000
<b>Remaining Funding Gap</b>	\$38	\$194	\$385	\$1,611	\$2,228

# How to Pay for Sample Financial Aid Analysis

## Base Scenario



### How to Pay: Whitman College

<b>\$23,691</b>	<b>\$263/m</b>	<b>\$153/m</b>	<b>\$3,180/m</b>
Total Loans at Whitman College: Great	Total Repayment for 10-year plan, \$31,562	Total Repayment for 25-year plan, \$45,792	Estimated Monthly Take-Home Pay for Business

	'23/'24	'24/'25	'25/'26	'26/'27	Total
Tuition	\$57,661	\$59,391	\$61,173	\$63,008	\$241,233
Room and Board	\$14,214	\$14,640	\$15,079	\$15,531	\$59,464
Books and Supplies	\$1,442	\$1,485	\$1,530	\$1,576	\$6,033
Travel and Misc					
Other Fees					
Cost of Attendance	\$73,317	\$75,516	\$77,782	\$80,115	\$306,730
Need Based Grants	\$44,719	\$45,655	\$47,422	\$49,243	\$187,039
Merit Scholarship	\$12,000	\$12,000	\$12,000	\$12,000	
Private Scholarships					
<b>Net Cost</b>	\$28,598	\$29,861	\$30,360	\$30,872	\$119,691
Total 529 Savings Plan (start of college)					
Parent Pledged Assets	\$24,000	\$24,000	\$24,000	\$24,000	\$96,000
Parent Pledged Monthly Cash Flow					
American Opportunity Tax Credit					
Student Pledged Assets					
Student Pledged Monthly Cash Flow					
Grandparent and Other Help					
<b>Pre-Approval Amount</b>	\$24,000	\$24,000	\$24,000	\$24,000	\$96,000
<b>Funding Gap</b>	\$4,598	\$5,861	\$6,360	\$6,872	\$23,691
Federal Direct Student Loan	\$5,500	\$6,500	\$7,500	\$7,500	\$27,000
Private Student Loan					
Federal Direct Parent Plus Loan					
HELOC/Other Loans					
<b>Loan Total</b>	\$5,500	\$6,500	\$7,500	\$7,500	\$27,000
<b>Remaining Funding Gap</b>	\$-902	\$-639	\$-1,140	\$-628	\$-3,309





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### Disclosures

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#### **College Aid Pro™**

Estimates of financial need shown can vary significantly among the colleges to which you are applying for aid. This is because each college sets its own policy about how to determine eligibility for their private funds. Therefore, your final offer of financial aid may be higher or lower than is indicated by this tool. Those differences in aid policies will also affect your net price, which is the full cost of attendance at a college minus the amount of grants and scholarships (“free money”) you receive from the college. The College Aid Pro™ tool is not intended to provide investment advice nor does it reflect all the various institutional aid policies that may affect the student’s final aid award package. The estimate provided using this platform does not represent a final determination, or actual award, of financial assistance. The price of attendance and financial aid availability may change. This estimate shall not be binding on College Aid Pro™.

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#### **Collegiate Financial Coach, LLC**