

the college admissions checklist

A CHECKLIST EBOOK



Yorkshire
College Planning

intro

who is this for?

These checklists are for parents and students that want to start planning for college admissions.

how to use?

Included in this eBook are 4 separate checklists. Simply print them out and place them somewhere you can reference them often:

Overview Checklist: this checklist will give you a 3-year overview of the college admissions process. Of course, not everyone will receive this checklist in their Sophomore year. If that's you, find where you are in the journey and catch up.

Sophomore Checklist: Sophomore year is a great year to get ahead on the college admissions process. In your Sophomore year you'll be researching your overall education tract and which schools will best serve your career goals.

Junior Checklist: Junior year is the year for testing, college visits, finalizing your college list, and starting your college admissions essays. Keep track of it all with this checklist.

Senior Checklist: Senior year is the "paperwork year" - A LOT of paperwork and forms. So be ready. Even if you've done no preparation at this point, our checklist can help you get a handle on things.

who does what?

On each checklist you'll find a color legend that tells you how responsibilities should be divided along the way.

ORANGE - these are the student's responsibilities

GREEN - this is the family's responsibilities (usually parents*)

BLUE - this is your College Planning Advisor's responsibility



responsibilities

division of labor

We've broken down the planning process by responsible party. The parent, the student, and the advisor all have a role to play in a successful admissions plan.

parents

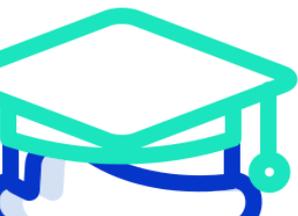
1. Estimate Family Contribution (EFC)
2. Apply for Financial Aid (through FAFSA and CSS Profile)
3. Assess your own retirement readiness to not compromise future financial stability
4. Calculate cash flow for college and prepare a plan to pay for college for each of your children

students

1. Match qualifications for career and college alignment
2. Prepare for college admissions
3. Gain self-awareness for long-term educational outlook
4. Cultivate the right mindset

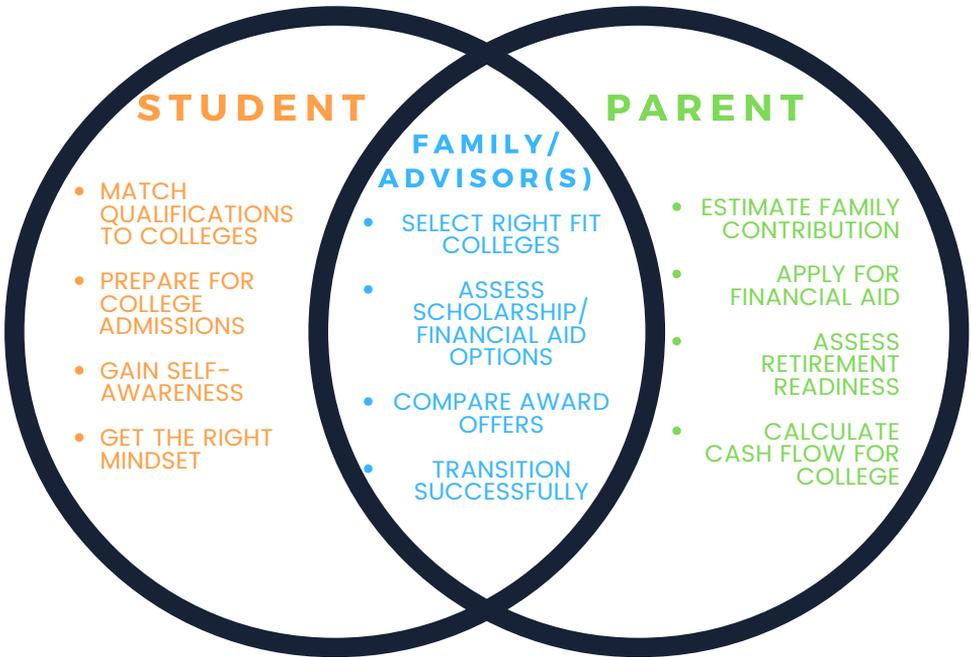
family/advisor(s)

1. Select "right fit" colleges
2. Assess scholarship and financial aid options
3. Compare admissions packages/ financial aid offers from colleges
4. Transition successfully



responsibilities

breakdown



our team



Phil Bell, Director of College Planning

Phil Bell is the Founder of Yorkshire College Planning, and has been advising college-bound families for over 30 years. He is a College Admissions (CCPS) and College Funding (CCFS) expert.



Sean Bell, College Planning Advisor

Sean Bell is a College Planning Advisor at Yorkshire College Planning. He is a Certified College Planning (CCPS) and College Funding (CCFS) Specialist.



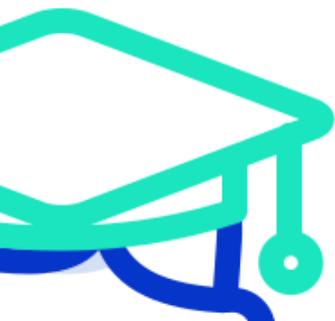
Mike Escobar, Director of Foreign Student Admissions

Mike Escobar is the Director of Foreign Student Admissions at Yorkshire College Planning. Formerly a Math teacher and wrestling coach, Mike is a member of the National Association of Foreign Student Advisors (NAFSA) and a Certified College Funding Specialist (CCFS).



Douglas Shultz, Director of Wealth Strategies

Douglas Shultz is the Founder of Yorkshire Wealth Management. He is the resident wealth strategy expert at Yorkshire College Planning, and currently serves as the Treasurer of Escondido, California.



junior year



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GRADE:

JUNIOR YEAR

MONTH

AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL

	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL
1 Calculate EFC												
2 Assess Retirement Readiness												
3 Calculate College Cash Flow												
4 Calendar Issues: Vacations, Visits, Etc.	Family	Family										
5 College Major & Career Assessments	Family	Family										
6 Prep & Take PSAT/ NMSQT	Family	Family										
7 Review Curriculum Strength for Grades 11 & 12												
8 Review PSAT/ NMSQT Results				Family	Family	Family						
9 Student Competitive Position (CAP Index)	Family	Family	Family	Family	Family	Family						
10 Establish Test Strategy: SAT vs ACT	Family	Family	Family	Family	Family							
11 Identify College Search Criteria	Family	Family	Family	Family	Family							
12 Start Initial College Search				Family								
13 Prepare for SAT/ACT					Family							
14 Take SAT/ACT					Family							
15 College Research & Evaluation					Family							
16 Letters of Recommendation Requested								Family	Family	Family	Family	
17 Spring College Visits							Family	Family	Family	Family		
18 Summer College Visits											Family	Family
19 Finalize College List											Family	Family
20 Register for Common Application												
21 ID Admissions & Financial Aid Deadlines												
22 Fall College Visits												
23 College Interviews - Fall Senior Year												
24 Draft Common Application Personal Essay												Family
25 Identify & Begin Writing Additional Essays												Family
26 Advisor Reviews Common Application												
27 Submit Common Application												
28 Register for CSS Profile												
29 Complete CSS Profile												
30 Registration: FSA ID for FAFSA												
31 Complete & Submit FAFSA												
32 Evaluate Financial Aid Awards												
33 Make Final College Visits (if necessary)												
34 Final Decision(s) & Enrollment Deposit(s)												
35 Decide on First Year Financing Options												

	STUDENT RESPONSIBILITY
	FAMILY RESPONSIBILITY
	ADVISOR RESPONSIBILITY



who we are

Yorkshire College Planning is a college admissions and college financial aid advisory firm. We specialize in ALL things college. For the past 30 years, we have helped families from all over the US through the college process. To date, over **4,300 families** have been helped by our team.

We serve families like yours as full-service "College Planning **Project Managers**."

what we do

College Admissions Planning - First, we help you decide on the best-choice colleges and career tracts for your children. Second, we develop and execute a plan to get your children into their first-choice colleges (4 out of 5 Yorkshire families get into their 1st choice colleges). Third, we advise with everything in between and along the way like ACT/SAT prep and college forms, applications, and essays.

College Funding Planning - Financial aid. Merit aid. Student and parent loans. Federal and private loans. Scholarships and financial awards. We are financial aid experts, and our goal is to make sure you have as few out-of-pocket expenses as possible.

how we help

Our mission for **parents** is to de-stress and simplify the college planning process – to be a professional guide and friend to parents when they need it most.

Our mission for **students** is to proactively align their career goals, college major, and college choices so they enter the marketplace with every advantage possible.

Our mission for **families** is simple, yet powerful: to save as much money on college as possible using every strategy and tool at our disposal.



thanks!

IF YOU'VE DOWNLOADED THIS CHECKLIST EBOOK, IT MEANS YOU'RE SERIOUS ABOUT YOUR CHILD'S FUTURE! A HEARTFELT THANK YOU FROM THE YORKSHIRE COLLEGE PLANNING TEAM - WE ARE PASSIONATE ABOUT COLLEGE PLANNING!

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