

Affiliate Program II: **“College Planning”** Not College Savings **with Affiliate Equity by Design**

The CORNERSTONE Financial Services “College Planning” Affiliate Program was developed in conjunction with Jeff Gaudette¹ President and Owner of Equity by Design. Their College Planning Advisors - “*Equity Professors*” are authorized members of CPPS (Certified College Planning Specialist) and are dedicated to working with the parent (s) of college bound kids wrestling with the complexities of choosing the right college and the overwhelming burden of paying for college?

Equity by Design assists families in creating a realistic college game plan linking both the student’s academic abilities with the parent’s financial resources. The result is a plan design that will not break the family bank, force parents to dip in to retirement savings, or require a change in their current lifestyle.

The **“College Planning” Affiliate Program** combines the services of an **“Equity Professor”** that:

- Provide *Your Clients* with a 7 Step Process to navigate the complex and often confusing process of planning their children’s college education.
- Shows *Your Clients* how to reduce at least 25% of their out-of-pocket costs for college
- Improves *Your Clients* cash flow during the college years.

With the **Cash Flow GPS with Coaching Platform** that is designed to:

- Partner with the “*Equity Professor*”.
- Create a customized plan with a road map to implementing the strategies so *Your Client* will reach their goals in the most efficient way possible.
- Identify where *Your Clients* are financially right now, where they want to be, and when they want to get there.
- Present the “Financial Process” to *Your Clients* using a systematic method of determining their unique set of goals and objectives.

There are three (3) College Planning Affiliate Program Options to choose from: 1) become an Equity by Design “*Equity Professor*” and get CPPS Certified (creating large case commissions), 2) become a Participating Provider with an Equity by Design “*Equity Professor*” (share commissions), or 3) be an Equity by Design Introducing Advisor (receive a referral Fee).

Your Success is accomplished using the Equity by Design Step by Step Program:

1. Prospect Marketing Material for Starting Conversations and Inviting to Public Seminars
2. Regularly Scheduled Physical and Webinar Client Seminars
3. Regularly Scheduled Physical and Webinar Agent Training
4. Systematic Closing System producing Larger Cases and More Income
5. Coaching System that creates additional Opportunities and Referrals

For More Information

call: C. Rod Maxson @ 954-794-0950x207 or email crm@cfsinc.org

¹Jeff Gaudette - The Equity Professor is a team of financial services professionals dedicated to bettering the financial futures of our clients. There are thousands of different plans and strategies available to manage your personal finance. The problem is that no matter what strategy you choose, implementing and managing that plan proves to be far more difficult than it looked on paper. Life happens and things always seem to come up that throw us off course. It's those unexpected and unplanned expenses that cause us to make decisions that are clouded by emotion. Fear, anger, anxiety and remorse end up shaping how we manage through those difficult times.