

This Consulting Contract is being entered into by _____ (“Client”), parent or legal guardian of _____, and Jill Andersen (“Consultant”) of Capstone Education Advisers LLC this day of _____.

Our Services

Capstone provides comprehensive, one-on-one pre-college and college-counseling packages that can begin as early as the 9th grade. Our educational consultants have the expertise and knowledge to help guide your family as you navigate your student’s high school years leading up to their college applications. Capstone also provides hourly support to families who are seeking guidance on specific aspects of the college application process, including the college essays.

We also provide application and admissions support for college students looking to transfer.

Our services include:

- » Academic and extracurricular activity guidance, including enrichment classes and summer activity planning, unique to your student’s talents and interests.
- » Guidance on testing strategy, including during COVID-19.
- » Career exploration, testing, and advising.
- » Targeted research and education for students and parents related to their unique college admissions process.
- » Individualized support and guidance for students with learning challenges.
- » Guiding each family and student as they develop the criteria used in their college search.
- » Development of the college list based on each student’s criteria.
- » Advice on college visits and effective ways to evaluate colleges in-person and online.
- » Development of your student’s résumé and extracurricular activity lists, including the detailed activity descriptions for the UC and Common Applications.
- » Help to identify each student’s best qualities, talents and strengths during the process of developing essay themes.
- » Team and one-on-one essay coaching, which includes helping each student highlight their personal growth and insight, while reviewing, revising, and polishing all essays with your Capstone counselor and our essay specialist.
- » Teaching students how to conduct detailed research on each of their top colleges in preparation for their supplemental essays and interviews.
- » Interview preparation and mock interviews.
- » Expert guidance on application strategies (early action/decision, regular decision, rolling).
- » Guidance on merit and need-based aid and review of financial-aid packages.
- » Assistance with final college selection and notification, housing deposits, and preparation for orientation and transition to college.

Our Structured Process

As part of our personalized services, we provide a proven process to guide your student. Every step of the way, your student will receive comprehensive materials developed and tested by Capstone, and parents will be kept informed.

We offer the following meeting schedule:

- » 3 meetings per year during 9th and 10th grades.
- » 1-2 meetings per month during 11th grade.
- » 1 meeting per week during the summer before 12th grade.
- » 1-4 meetings per month during the fall of 12th grade, depending on student progress.
- » 2-4 meetings per month for transfer applicants.

Our clients will also receive:

- » A comprehensive resources ebook developed and tested by Capstone counselors.
- » Detailed e-worksheets, check lists, and application timelines to help students finalize all components of their applications prior to their deadlines.
- » Detailed meeting summaries and task lists after each student-counselor meeting.

Our Pricing

Services	Fees	Initials
30-Hour College Counseling Package A full-service, one-on-one college counseling package, including all services listed above as needed. Payment schedule below. Additional hours @ \$275/hr.	\$8,250	_____
10-Hour College Counseling Package An hourly package for any of our services listed above. Payment due before first meeting.	\$3,000	_____
5-Hour Essay Writing Package Assistance with essay planning, reviewing, revising, polishing and finalizing. Payment due before first meeting.	\$1,500	_____
Capstone Hourly Fees À la carte hours for any of our services listed above. Hourly services require a 4-hour retainer (\$1,300 minimum) before services begin.	\$325/hr	_____

Payment Schedule: 30-Hour College Counseling Package

Families purchasing the 30-Hour College Counseling Package may choose one of the following payment schedules:

Payment Schedules	Initials
Single Payment \$8,250 due upon engagement.	_____
Three payments \$3,000 due upon engagement; \$3,000 due on May 1 st of 11 th grade; \$2,250 due on September 1 st of 12 th grade.	_____
Monthly \$1,500 due upon engagement. Remaining payments divided evenly by month with final payment due September 1 st of 12 th grade.	_____

Additional Billing Information Initials _____

We bill for time spent on all services listed above, which includes up to 2 hours developing the preliminary college list and time spent reviewing essays in our Monday team meeting (will not exceed 15 minutes). We also bill for time spent on targeted research, email and other correspondence, and any necessary meetings via Zoom or phone, to discuss with and inform the student and parents about specific questions and overall student progress. We track time in 5-minute increments for tasks that exceed 10 minutes.

We offer the 5-Hour and 10-Hour Packages with the understanding that families may wish to stack multiple packages over time, depending on their admissions needs. Unused hours from the first package purchased will not be refunded. For example, if you purchase one 10-Hour Package and use only 8 of the 10 hours, the remaining 2 will not be refunded. However, if you purchase two 10-Hour packages and use only 17 of the 20 hours purchased, the remaining 3 will be refunded. Families rarely have unused hours left over after the end of their first package.

Deadlines Initials _____

Capstone has established internal application submission deadlines. These deadlines are fully achievable if the student meets all interim deadlines assigned by the counselor. Therefore, the deadlines will only be extended for extraordinary circumstances.

Published College Application Deadline	Capstone Deadline for Completion/ Submission of Application
November 1 st	October 24 th
November 15 th	November 7 th
November 30 th – December 1 st	November 15 th
December 15 th and later	December 15 th

Thanksgiving Weekend

Please note that Capstone counselors are unavailable to meet or review applications or other materials over the Thanksgiving weekend (Wednesday-Sunday). However, students are expected to make progress on application materials during the Thanksgiving break if they have not yet completed all applications that have a Capstone deadline of December 15.

Expectations Initials _____

We greatly respect our students and families, and our goal is for each of our students to matriculate to a college where they will thrive and form the solid foundation they need to achieve their educational, career and developmental goals. Experience has shown us that students are more likely to achieve this outcome if they take the process seriously by setting aside enough time each week to complete tasks in a thoughtful way and meet all internal and external deadlines. By taking this measured approach, students develop the skills and confidence to successfully manage a large, long-term project, while producing high-quality applications that are more likely to be successful.

We have developed a structured process and established specific expectations that we have observed, year-after-year, will result in the most calm, productive, and rewarding college-counseling experiences. Parents also play an important role in this process, as outlined below.

College admissions decisions are often more about a college's priorities than about a given student's qualifications. Decisions are based on multiple factors that may include test scores, GPA, essays, activities, letters of recommendation, legacy status, athletic talent, donor status, artistic talent, ethnic background, first-generation status, geography, and various subjective factors. We will help you build a balanced list and expect students to apply to at least two colleges that the Capstone consultant has identified as "likely" colleges for the student (e.g., colleges that the student is more likely to be admitted to than to be denied from).

Expectations for Student

- » Set aside enough time to complete each assigned task thoughtfully.
- » Meet all task deadlines developed collaboratively with the Capstone counselor.
- » Maintain their own list of all application deadlines and meet the deadlines.
- » Attend all weekly* meetings, which are generally one hour. For specific meeting activities, such as reviewing the Common Application or UC Application, the meetings may be longer. (**Students beginning the process with us on or after September 1st of 12th grade may be expected to attend more than one meeting per week, depending on progress.*)
- » Provide a minimum of 24 hours' notice if needing to reschedule a meeting.
- » Comply with high school deadlines set by the school counseling office.
- » Inform the school counseling office in a timely manner about the colleges the student will be applying to, using the school's preferred method (e.g., *Naviance*).
- » Commit that all essays will be the student's work.
- » Request and monitor the status of teacher recommendation letters.
- » Set up and monitor individual college application portals and emails.
- » Maintain ongoing efforts to "demonstrate interest" in colleges.

Expectations for Parent

- » Read all communications from the counselor.
- » Attend scheduled “family” meetings with the counselor.
- » Commit that all essays will be the student’s work.
- » Check in regularly with their student to ensure progress on tasks and compliance with high school deadlines.
- » Help students schedule college visits and tours, both in person and virtually.

Expectations for Capstone Counselors

- » Respond to email and text communications, typically within 24 hours for weekday communications or on Mondays for weekend communications.
- » Provide the student and family with follow-up emails after each meeting that summarize meeting accomplishments and outline the task list for that week.
- » Educate themselves on the latest developments in college admissions and use this information to inform their guidance practices.
- » At all times, treat the student and family with respect and prioritize their needs.

Disclaimer Initials _____

It is understood that the Client and their student are responsible for:

- » Verifying the accuracy of the information submitted in the student’s applications.
- » Ensuring that all components of each application are submitted by the application deadline.
- » Educating themselves about the ability to afford the college and the financial stability of the college that their student has chosen.

Clients are not permitted to use the intellectual property owned by Capstone Education Advisers LLC for any reason other than to directly support their own children’s college applications. Clients are not permitted to distribute the intellectual property owned by Capstone Education Advisers LLC. Consultant reserves the right to seek all remedies available at law for infringement or unauthorized use of intellectual property. Liability arising from the professional actions, errors or omissions of Capstone Education Advisers LLC (including but not limited to Carolyn Weirick and Shelley M. Enger) shall not exceed the total fees paid for services. Client hereby waives any right to any additional remedy, including consequential or non-economic damages.

Client and student are responsible for meeting all application requirements and deadlines established by the colleges. Client and student understand and agree that services provided come with no guarantee that the student will be admitted to any particular university, college or institution.

Signatures

This document can be initialed and signed in Adobe Acrobat Reader, Apple Preview, Google Chrome, and other PDF readers, or printed and signed by hand. Please return by email when complete.

A handwritten signature in black ink that reads 'Jill Andersen'. The signature is written in a fluid, cursive style. Below the signature is a solid black horizontal line.

Jill Andersen, MA, PPS, Consultant

Signature of Client (parent/guardian)

Signature of Client (parent/guardian)

Signature of Client (parent/guardian)

For more information

Jill Andersen jill@capstoneadvisers.com

Client Experience Manager:

Veronica Mejia veronica@capstoneadvisers.com