



The College Funding Coach

Send you kids to college witout going broke.

Yes, parents, you can make the college dream a reality...
and still retire one day.

TheCollegeFundingCoach.org



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Our Story

Brock Jolly is a financial advisor with a very timely message. He founded The College Funding Coach® with one goal in mind: teaching parents how to pay for college for their kids without sacrificing their own retirement savings. His strategies are especially relevant these days as the recession has cut into families' financial reserves – their home values, their retirement nest egg, and their college savings – while college costs only continue to rise.

Since 2002, Brock has taught his refreshing and somewhat unconventional approach to college funding through adult education seminars in many counties throughout the Mid-Atlantic United States. His class, “Little-Known Secrets of Paying for College,” focuses on legal strategies for qualifying for more financial aid and leveraging assets in order to make your money work more efficiently and effectively—in the end reducing the total cost of attendance. Thousands of parents in the Washington, D.C. region have taken his course, many have become his clients, and his strategies have saved them significant amounts of money.

Mission Statement

Good Idea Makes
Everything is Better

Our Mission

Is to empower families and teach parents how to pay for college for their kids without sacrificing their own retirement savings.



Statistics

250

Little-Known Secret of
Paying For College Workshops
Each Year

13,283

Average Families Registered
Each Year

2,236

Families Served by
Our College Funding
Coaches This Year

2,892

Schools and Business
We Work With Each Year



Vision Statement

Opportunities Don't Happen,
You Creative Them With Planning

The College Funding Coach® is the nation's preeminent resource that educates, guides, and connects families with specialized financial advisors to make the dream of saving and paying for college a reality.

Our Process

Evaluation

Whether through one of our informative workshops, an online webinar, our website, social media, or by being referred by a friend, we want you to fully understand our process and the ways in which we are helping families—probably a lot like yours—save and pay for their children’s education.

Investigation

The first step is to understand the “rules of the game” when it comes to college funding. By understanding the standardized forms such as the FAFSA and CSS Profile, understanding the timeline and the types of strategies that are being used to save and pay for college, it gives us a great first step towards accomplishing the goal of paying for higher education...and still retiring one day!

Confidential Understanding

Our process is designed for you to work one-on-one with one of our trusted coaches who will really get to know you and understand your children, your goals and what makes you tick—not just in terms of the singular goal of paying for college; but how that relates to the rest of your financial world.

Exploration

By exploring various financial strategies and how they can improve your financial circumstances and the advantages and disadvantages of each option, we are able to determine the type of strategies that will help to accomplish your goals.

Implementation

By going to the financial markets, negotiating on your behalf and selecting institutions with whom to work to customize your plan, we can bring these strategies to life. Our team manages the entire process on your behalf and helps you to position your newly implemented strategies into your existing planning.

Monitoring

Through our ongoing client service model, we help clients monitor changes in the capital markets, tax law changes, changes in the cost of college, and even familial changes so that your strategic planning evolves with you.



The Problem

For most families, they are torn between saving for college or saving for retirement. It doesn't have to be that way!

What began in 2002 with a single financial coach on a mission to help educate parents in the Washington, D.C. area with strategies for saving and paying for college has grown into a national team of nearly 100 coaches spread across the country. We help families better understand the complex strategies for saving and paying for college and making higher education more affordable.

We collaborate with schools, businesses, churches, synagogues and community organizations to conduct several hundred workshops each year. Our interactive workshop, Little-Known Secrets of Paying for College, teaches parents the rules of the game when it comes to financial aid, as well as the critical strategies to help them win that game—whether by qualifying for need-based aid or by maximizing cash flow and liquidity.

As you can imagine, the stock market has gone up and gone down. Taxes have gone up and gone down. Unemployment has increased and then decreased. But two things have remained constant every year: approximately 20 million high school students head off to college[1], and since 2000, the cost of tuition and fees at American colleges has more than tripled the rate of inflation[2].

[1] National Center for Education Statistics—Digest of Education Statistics Table 105.30: https://nces.ed.gov/programs/digest/d17/tables/dt17_105.30.asp

[2] Source: <https://www.advisorperspectives.com/dshort?referrer=dshort.com>



Solution

We help the families with whom we work understand the process and incorporate college planning into the broader context of their financial plans—from risk management to investing, estate planning and tax management. By taking a comprehensive view of a family’s finances, we are often able to correct inefficiencies and capture dollars that can be redeployed towards paying for college. Our approach helps parents reduce their out-of-pocket expenses and balance the challenge (and the stress) of saving for college and retirement simultaneously.

Our flagship ***Little-Known Secrets of Paying for College*** webinar is the most common and is packed with information. This is a live overview of the whole funding process. If you see a listing with just the name of a school or organization, it is a LKS webinar and is open to the public unless stated otherwise.

We also offer “specialty webinars” that drill down on specific areas within the world of college funding: think student loans, the financial aid process, creative ways to reduce college costs, pros and cons of various financial strategies, and much more.



Who We Serve



Nationwide

School Districts and Business Owners



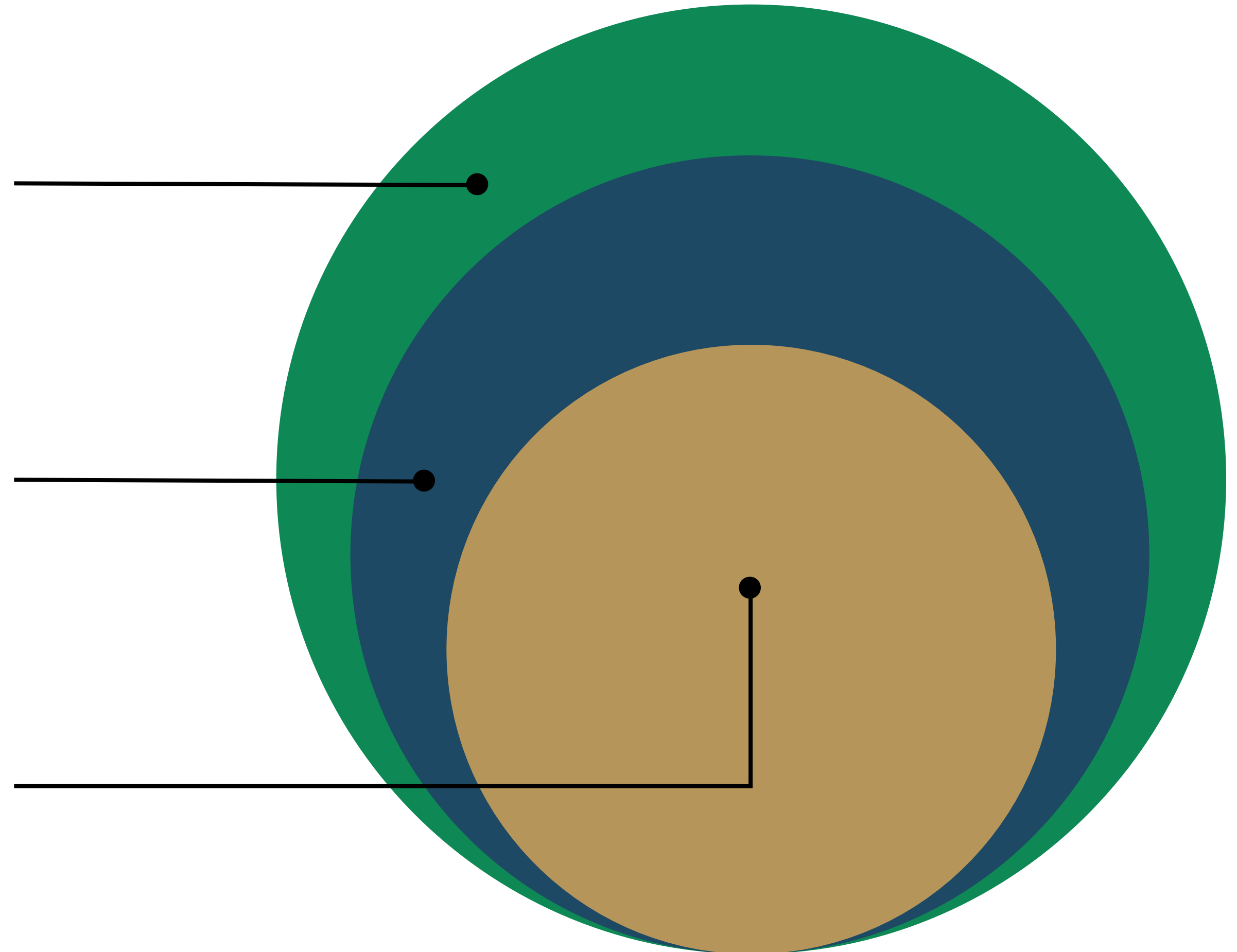
Families

The College Funding Coach® was founded in 2002 to help families better understand the complex strategies for paying for college and making higher education more affordable.

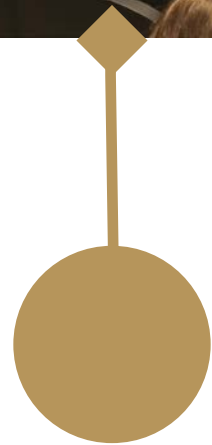
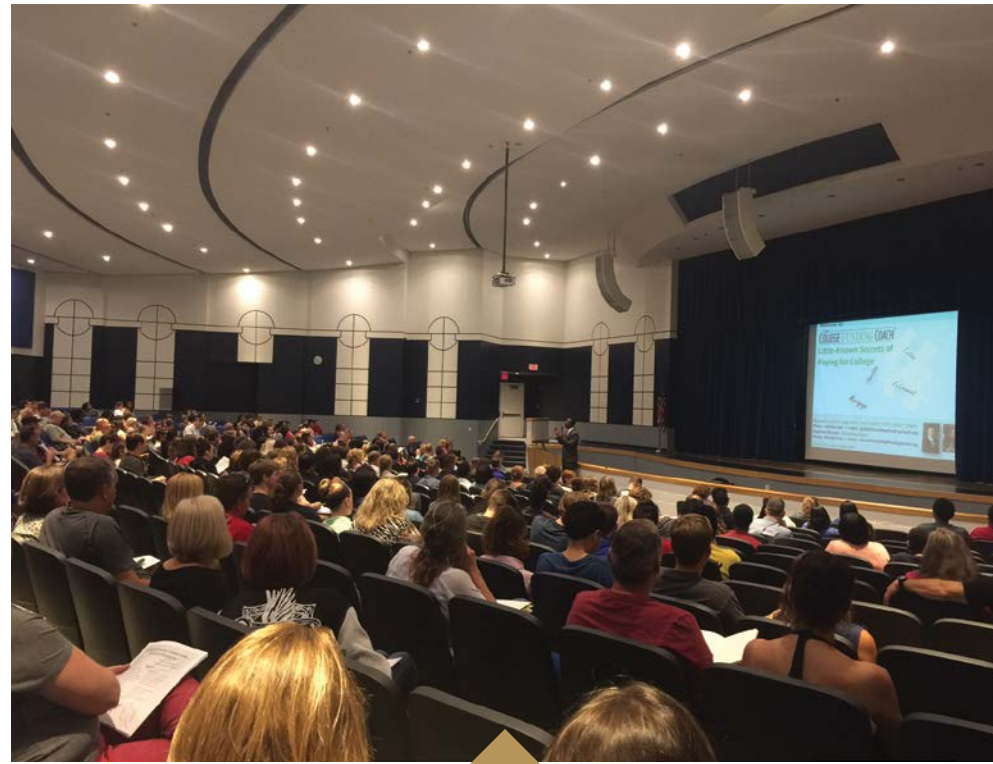


Counselors

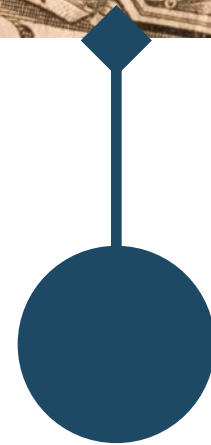
Our informative workshop Little-Known Secrets of Paying for College helps families navigate the rules of saving and paying for college!



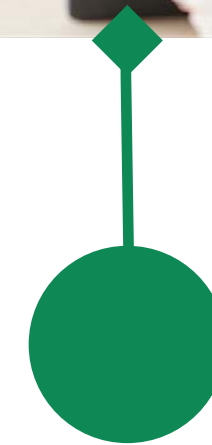
Educational Services



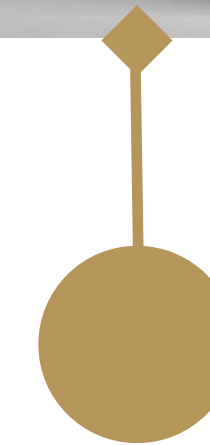
Free two hours workshop for schools, in person or a webinar to offer to their parents as a resource



Free Resources for schools and Parents on Financial Strategies



Free Initial Consultation



A library of free on-demand webinars and workbooks

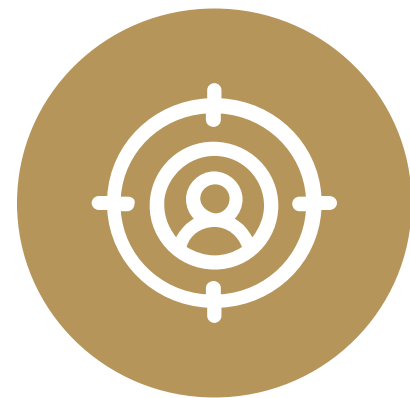
Service



Financial Planning

Fee Based Financial Planning

- Asset Allocation Analysis
- Retirement Income Needs Analysis
- Education Planning
- Budgeting and Cash Flow Analysis
- Life, Disability Income and Long Term Care
- Insurance Needs Analysis



Wealth Management

- Securities Brokerage Services
- Institutional Managed Accounts
- Passive Investments
- Alternative Assets
- Tax Efficient Strategies
- Socially Conscious Investments
- Variable Annuities
- Retirement Income Strategies
- College Funding



Risk Management

- Life Insurance
- Disability Income Insurance
- Long Term Care Insurance
- Annuities



Our Team



Brock T. Jolly

Founder and
Financial Advisor



Andrea Ashton

Chief Operations Officer



Bernadette Boyle

Director of
Educational Programs



Tiffany Stewart

Director of
Membership Development

Our Team



Pat Pacious

Content Marketing Manager



Demetrius Doss

Regional Director



Murray J. Miller

Membership Development



Alexandra Koury

Marketing Strategy Consultant

Parents Testimonial

Great workshop!! Eye opening & really has me thinking

Jessica H., KY

This was very informative. Im so glad I learned about this organization and the available resources. Everyone can take something useful from the presentations. A heart felt Thank You from a concerned parent.

Michelle W., VA

Very informative and a good use of my time. Made me more positive about paying for college without the student having to incur debt or having to work. Didn't know you could negotiate with the colleges.

Julie R., VA

The workshop was a great resource for parents and I must say every minute of it was worth it. I felt like I learned a lot.

Behrije O., NJ

Thank you for all the information you have and continue to share via your website, email, Facebook, and these fantastic webinars!

Also, thank you for attempting to answer everyone's questions in the chat. I felt that you went above and beyond in doing so and it really made me feel that you are here to help parents and it is very appreciated!! Glad to know there is help out there to navigate this ever-changing and complex college funding environment.

Joanna M., PA

Informative for our financially savvy families and those that aren't so financially savvy.

Damian G., MD

The workshop was great and definitely worth my time as a parent. I learned a great deal about the FAFSA and the overall application process that I was not previously aware of. Mike Russell is a wonderful presenter - very clear and engaging. He did not sugar-coat the potential trapdoors of the college admissions process and I appreciate that. I left feeling both hopeful and better informed! :)

Grant J., SC

I wish I attended such webinar years ago. Great strategies and better understanding of the whole process. Thank you.

Ekaterina F., NJ

The workshop was very good. I've already had two kids get through college with one more (rising senior) to go but I still learned a few new things in the ever-changing college admissions world. Thank you for hosting it.

Jamie D., NC

It was an eye opening workshop that taught us that college is so much more than just getting in. Thank you.

Jeremy B., VA

Informative information for families with young children and those with teens who are on the cusp of college already

Sheri M., VA

Wow, you were right! You did give a wealth of information. I know feel knowledgeable about what's to come in four years and we need to take a look at where we are and where we need to be in four years when our oldest graduates. The plan starts now - thank you for the tools and motivation

Monica P., NC

School Testimonial

Debbie Monahan,
College
Counseling Director

The College Funding Coach staff were professional, friendly and knowledgeable, sharing valuable and vital financial aid information to our parents that was way beyond my knowledge. They provided all of the marketing pieces we needed to effectively communicate their session to our families. This year, I will expand the meeting invitation to both our middle school and high school families. I highly recommend the College Funding Coach to walk your families through some very practical steps to help meet their student's college plans.



Carolyn Senter,
Director of College
Counseling

Thank you so much for a wonderful presentation! The information you presented was easy to understand and extremely helpful. Now that I understand your program, I would like to have you back again next fall and make this opportunity available to the public. Our lower school division head was there and she is going to really advertise to her division. Thank you again for a great evening!

Tony Bauer, School
Counseling

Working with Brock Jolly and The College Funding Coach has been a real pleasure. Having Brock teach our parent community the many ways that they can pay for their student's college expenses was a wonderful supplement to the basic financial aid information we usually provide parents. Brock's real world experiences and his practical strategies are exactly what our parents need in determining how to make college affordable. The staff at the College Funding Coach are all professional, hard-working and really care about helping people with their investment decisions.



Catherine Gillespie,
Director of
College Counseling

It was a pleasure having Demetrius meet with our parents! I was impressed by how much information he was able to convey during his presentation, and how engaged our parents remained throughout the evening. This is obviously extremely relevant information for them, and they greatly valued his time and his expertise!



Contact Us



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