

ONWARD + UPWARD Educational Counseling – Service Agreement

Thank you for selecting ONWARD + UPWARD for your college counseling and advising services. This Service Agreement outlines the professional relationship between clients and consultant (commonly referred to as “counselor”) and sets forth the scope, terms and conditions of your engagement of college counseling and advising services provided by ONWARD + UPWARD.

Student name: _____

High school graduation year: _____

Counselor’s responsibilities may include:

- Initial consultation with family to discuss college planning, admissions expectations and timelines
- Review of student’s educational profile, including GPA, coursework, standardized test scores, co-curriculars and relevant diagnoses for an informed opinion regarding college “fit”
- Administration of personality, aptitude, value and interest assessments to guide college planning and self-discovery
- Guidance for choosing high school courses and/or pathways
- Overview of college entrance exams, testing schedule and referrals to test preparation resources
- Advising on how to research potential colleges and degree programs
- Developing a customized college list based on student interests, skills, goals and financial considerations
- Essay brainstorming, drafting and strategy approaches
- Keeping parents/guardians informed of student progress
- Exploring student interests, majors and careers during scheduled meetings
- Assisting the student with each section of college application and then reviewing for accuracy and completion prior to sending it to colleges
- Developing a resume to represent co-curriculars, awards, volunteer and work experience
- Helping the student to reflect upon prior experiences as related to applying to colleges, writing essays, and making a final decision for attendance
- Recommendations and resources to maximize college visits
- Assistance with final school choice
- Support for transition to college, choosing coursework, considering majors and minors
- Abiding by the highest ethical standards set by the Independent Educational Consultants Association (IECA)

Counselor’s responsibilities do not include:

- Guarantee of admission to or satisfaction with choice of or experience at a particular college, university or program
- Guarantee of athletic recruitment or scholarship offers at any university or a particular college
- Serving as an athletic scout or recruitment coach for any sport
- Contacting universities or its employees on behalf of a specific student/family and/or imposing undue pressure on schools for acceptance
- Writing essays or filling out applications on behalf of the student
- Placing undue pressure on the student to complete assignments, initiate contact with schools or coaches (when applicable), or choose a particular major or college

Student’s and family’s responsibilities include:

- Sharing all relevant educational records
- Utilizing counselor’s online personalized student college application management program for primary written communication and documentation of work with counselor
- Attending scheduled meetings and meeting deadlines

- Securing school records, test scores, academic and personal recommendations, and forwarding them to colleges using the method preferred by the college and/or student's high school
- Completing applications, essays and portfolios (when applicable) after review with counselor in a timely manner
- Providing honest and accurate application information
- Completing and submitting all financial aid forms for colleges, seeking guidance from an accountant or other finance expert when needed
- Scheduling college visits and interviews
- Notifying counselor and colleges of any decisions to accept or decline offers of admission

We are fully committed to your student for the duration of our counseling relationship. Thank you for your family's commitment to the college process.

Payment Agreement

In order to begin counseling services, client must submit a deposit of 50% of the total package fee. at the time the Service Agreement is signed and returned. (Upfront payment in full is fine as well.) If the hourly rate is preferred, a deposit equivalent to 4 hours of payment is due at the time the Service Agreement is signed and returned. Additional payments on packages and hourly fees must be received within 10 business days of the dated invoice in order for the student to continue receiving services. Invoices for second/final payment will be issued on August 1st, before senior year begins.

Note: Canceling or missing an appointment without a minimum of 24 hours advance notification may result in an additional \$100 charge to the client. Frequently missed appointments may be considered a breach of contract.

ONWARD + UPWARD Educational Counseling agrees to keep all personal, academic, medical and financial information concerning the client or client's family confidential except in those cases in which the client's or other's welfare is at risk and/or the client's parents/guardians approve the release of client data.

Service options:

ACCEPTED Date: _____

- The Comprehensive
- The Comprehensive for Athletes
- Senior Essentials
- The Write Stuff
- California Dreaming (UC and CSU only)
- Sophomore Add-on
- Freshman Add-on
- Early Bird (8th grade)
- Transitions (post-HS)
- Hourly Counseling

Client: Parent(s) names – printed & signature

Client: Student name – printed & signature

Counselor: Ann Bartron Morris
ONWARD + UPWARD Educational Counseling

