



Bunny Porter-Shirley
Founder

Sue Crowell
Dir. of Educational and
Therapeutic Needs

Kati Lohr
Dir. of Family Support

Dear prospective parent,

Thank you for choosing Eduplanners to assist you and your family in this time of need. We understand that with the busy schedules and active family lives it is difficult to track and gather the necessary materials needed for us collectively to move forward and provide the services requested for you and your family.

Please feel free to utilize this document to keep track of the progress made during this time.

FOR ALL SERVICES REQUESTED:

- Eduplanners contract
- Initial retainer payment (certified check, wire transfer confirmation, credit card etc)

FOR COLLEGE PLACEMENT:

- Transcripts from grade 9 thru present
- Copies of all SAT / ACT results
- Copies of all certificates / trainings / certifications / awards
- Copies of all Previous Psychological / IQ etc. testing results
- Overview of special interests / hobbies / etc.
- List of desired/interested colleges
- Copies of all Pell Grant, Financial Aide, Student Loan documents
- Copies of all applications to prospective colleges

FOR BOARDING SCHOOL / THERAPEUTIC PLACEMENT:

- Full student names including:
 - DOB
 - Physical descriptions
 - Immunization records
- Accurate contact information for all legal guardians including:
 - First/last names
 - Home/ mobile/ office numbers
 - Home address
- Copies of all guardianship/divorce/Adoption documents
- Accurate contact information for all siblings including:
 - First/last names
 - Home/ mobile
 - Home address
- Private individual, family clinicians:
 - Dates seen
 - Services provided to whom
 - Accurate contact information including office/mobile numbers and mailing address
 - Affiliation with any of the following: School, hospital, IOP etc
- Prior interventions (i.e. inpatient, IOP etc)
- Copies of all Previous Psychological / IQ etc. testing results