

How to Give a Financial Aid Presentation

April 13th, 2023

About You



Heather Ehnert

Financial Aid Officer

University of Wisconsin-Milwaukee

ehnert@uwm.edu

Fun Fact: I have two nephews, ages 2 and 5 months; one kitty nephew, and one kitty niece 😊

About Your Organization: UW-Milwaukee

- Founded: 1956
- Wisconsin's 2nd-largest university
- One of 146 top research universities recognized as "R1" by the Carnegie Classification of Institutions of Higher Education
- Committed to providing equitable access to opportunities for students and employees from every background
- Undergraduate enrollment: 19,411
- Graduate enrollment: 4,418



Agenda

- Key Takeaway: **Balance!**
- Providing Info without Overwhelming
 - Audience
 - Jargon
- Visual Aids
- The Act of Presenting
 - Be YOURSELF!
 - Tips and tricks
- Questions

Visual Aids

PowerPoints

- Don't reinvent the wheel
- May not be needed if the presentation is with a smaller group

Handouts

- Option to take or leave a handout – sometimes wasted paper
- Many folks take pictures on their phones of important slides
- Better for intimate groups

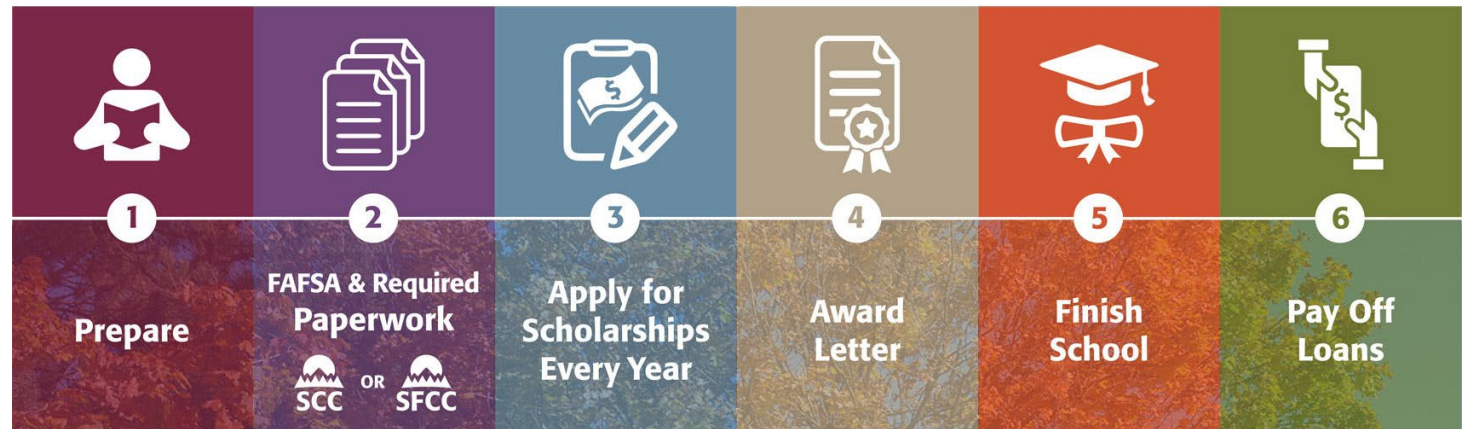
- Accessibility
 - Text size and contrast
- Charts, Images, Graphics, Text
 - Back to our key takeaway of BALANCE

Bad Example

Grade Level	Subsidized Annual Maximum Eligibility	Unsubsidized Annual Minimum Eligibility	Combined Annual Maximum Eligibility
Freshman (Dependent)	\$3,500	\$2,000	\$5,500
Sophomore (Dependent)	\$4,500	\$2,000	\$6,500
Junior & Senior (Dependent)	\$5,500	\$2,000	\$7,500
Freshman (Independent)	\$3,500	\$6,000	\$9,500
Sophomore (Independent)	\$4,500	\$6,000	\$10,500
Junior & Senior (Independent)	\$5,500	\$7,000	\$12,500

- **GRANTS:** Qualify based on FAFSA and Financial Need
 - Federal Pell Grant
 - Federal Supplemental Education Opportunity Grant
 - Wisconsin Grant
 - Tuition Assistance Grant
- **SCHOLARSHIPS**
- **FEDERAL WORK STUDY** (Need Based)
- **LOANS:**
 - Subsidized (Need based) and Unsubsidized

And a better example!...



Types of Aid

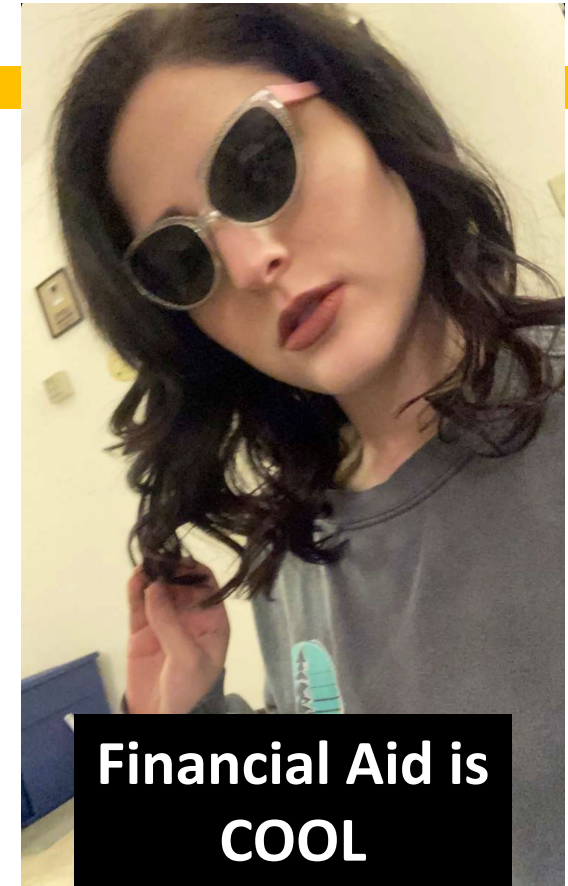
- **GRANTS:** Qualify based on FAFSA and Financial Need
 - Federal Pell Grant
 - Federal Supplemental Education Opportunity Grant
 - Wisconsin Grant
 - Tuition Assistance Grant
- **SCHOLARSHIPS**
- **FEDERAL WORK STUDY** (Need Based)
- **LOANS:**
 - Subsidized (Need based) and Unsubsidized

Annual Federal Loan Limits

Grade Level	Subsidized Annual Maximum Eligibility	Unsubsidized Annual Minimum Eligibility	Combined Annual Maximum Eligibility
Freshman (Dependent)	\$3,500	\$2,000	\$5,500
Sophomore (Dependent)	\$4,500	\$2,000	\$6,500
Junior & Senior (Dependent)	\$5,500	\$2,000	\$7,500
Freshman (Independent)	\$3,500	\$6,000	\$9,500
Sophomore (Independent)	\$4,500	\$6,000	\$10,500
Junior & Senior (Independent)	\$5,500	\$7,000	\$12,500

The Act of Presenting: Be YOURSELF!

- Introduce yourself with a fun fact
- Include your personality!
- Audience can best relate when you are not just a professional with all high-end knowledge, but also a real, regular person
- Acknowledge the “yuck”



The Act of Presenting: Tips & Tricks

- Wear your favorite “work outfit”
- Remind yourself that you’re an expert, and you are great!
- Encourage interruptions and questions
- Practice “hiccup” spots and slide/topic transitions
- Tap into your Emotional Intelligence
- Remember to breathe. You know the information; now it’s simply time to share it!

Remember:
BALANCE



Questions?

ehnert@uwm.edu