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COMPANY PROFILE

Student Financial View is a certified Economically Disadvantaged Women-Owned Small Business (EDWOSB) that provides financial consulting, government advisory, higher education consulting, tax advisory, financial wellness, and program support services. We partner with federal, state, and local agencies, prime contractors, educational institutions, nonprofit organizations, and commercial clients to deliver practical financial solutions that improve performance, strengthen compliance, and support mission success.

Our firm combines the responsiveness of a small business with **more than 15 years of financial services experience** spanning higher education, military financial readiness, tax preparation, financial education, and consulting.

WHY TEAM WITH STUDENT FINANCIAL VIEW

Student Financial View provides prime contractors with an agile, responsive, and collaborative teaming partner. Our experience across financial consulting, higher education, military financial readiness, tax advisory, and financial education allows us to complement multidisciplinary teams while maintaining a client-first approach and high standards of service delivery.

DIFFERENTIATORS

- Founder-led organization with deep subject matter expertise
- Experience supporting military communities
- Experience across government, higher education, and commercial sectors
- Nationwide virtual and on-site service delivery
- Commitment to integrity, responsiveness, and measurable outcomes

LEADERSHIP

Rosie Wright, AFC®

Founder & Principal Financial Consultant

Rosie Wright is an Accredited Financial Counselor with extensive experience in financial consulting, higher education financial aid, tax advisory, military financial readiness, and financial education. She has built Student Financial View around the belief that strong financial decisions create stronger organizations and healthier communities.



CORE COMPETENCIES

- Financial Consulting & Strategic Advisory
- Government Program Support
- Budget Planning & Financial Analysis
- Financial Education & Workforce Wellness
- Higher Education Financial Aid Consulting
- Tax Planning & Tax Preparation
- Stakeholder Engagement & Client Advisory
- Project Coordination & Administrative Support
- Workshop Facilitation & Curriculum Development



GOVERNMENT CONSULTING PRACTICE

- Financial analysis and reporting
- Budget planning and forecasting support
- Program administration support
- Research and policy review
- Executive briefings and presentations
- Training and stakeholder engagement



COMMERCIAL CONSULTING PRACTICE

- Business financial consulting
- Personal financial planning
- Tax advisory services
- Retirement and debt management strategies
- Financial literacy and employee wellness



FINANCIAL EXPERTISE. MEASURABLE IMPACT.

Delivering consulting, advisory, and program support that strengthens compliance, improves performance, and advances mission success.

REPRESENTATIVE PROJECTS

-  **Military Financial Readiness:** Provided one-on-one counseling, workshops, and financial education supporting service members and military families
-  **Higher Education Financial Aid:** Supported students and families with FAFSA, Title IV, financial aid advising, and college affordability planning
-  **Financial Wellness Consulting:** Delivered personalized budgeting, credit, debt reduction, retirement, and financial planning strategies to more than 2,000 individuals
-  **Tax Advisory:** Prepared and advised individual and small business clients on tax planning and compliance
-  **Training & Education:** Developed and facilitated financial education programs for diverse audiences

PAST PERFORMANCE HIGHLIGHTS

- 2,000+ individuals served through financial counseling and education
- 15+ years supporting higher education financial aid and student financial services
- Nearly a decade supporting military financial readiness initiatives
- Extensive experience delivering financial workshops and one-on-one advisory services
- Responsive support for individual, nonprofit, educational, and business clients

MISSION & VISION

Mission: To provide trusted financial consulting and advisory services that empower organizations and individuals to make informed decisions, strengthen financial performance, and achieve measurable results.

Vision: To become a nationally recognized consulting partner known for integrity, innovation, and excellence in financial consulting and government support.

Whether you are seeking a trusted consulting partner or specialized financial expertise, Student Financial View is ready to support your mission. Contact us to learn how our tailored solutions can help your organization achieve measurable results.



COMPANY CODES

- **UEI:** P41RY1F51H83
- **CAGE Code:** 8U0Y3
- **Primary NAICS:** 541611
- **Additional NAICS:** 541213, 611310, 611430, 624190, 611410, 813910

CERTIFICATIONS

- SBA Certified Economically Disadvantaged Women-Owned Small Business (EDWOSB)
- SBA Certified Women-Owned Small Business (WOSB)
- Accredited Financial Counselor (AFC®)
- SAM Registered



INDUSTRIES SERVED

- Federal Government
- State & Local Government
- Prime Contractors
- Military Organizations
- Higher Education
- Nonprofit Organizations
- Commercial Businesses
- Individuals