

**Celebrating Over 30 Years...**

**...and Supporting You for the Next 30**

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## **Life Event Planning Checklist: Children Going to College**

- Review college-dedicated assets vs. cost of tuition
- Review FAFSA options
- Review payment options (federal student loans, scholarships, private loans, 529 Plan, and retirement accounts)
- Consider a HELOC to help pay for expenses
- Create a budget for spending at college
- Decide if a credit card is a good idea
- Speak to an attorney about HIPAA, POA, and healthcare directives
- Review car insurance
- Review health insurance to make sure student is still covered properly at school (Especially if school is out-of-state)
- Review all of these items with your financial advisor