Celebrating Over 30 Years...

...and Supporting You for the Next 30

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Life Event Planning Checklist: Children Going to College

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

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