

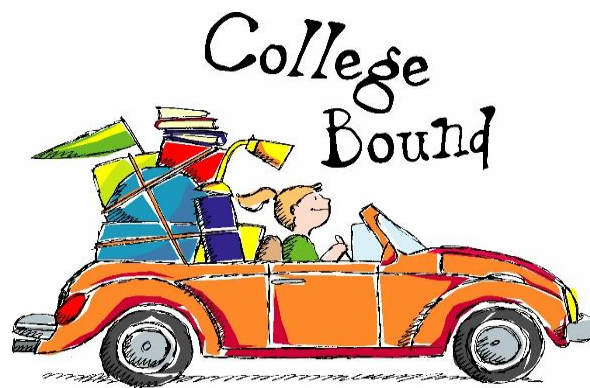


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Life Event Planning Checklist

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, Retirement Accounts)
- ☐ Open 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, 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



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