

## Life Event Planning: Child Going to College Checklist



- 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 if there is a chance it will be needed
- 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

While this check list can start as a guide, speaking to us is the best way to get your 2019 financial life in order. Reach out to us today!

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