

Life Event Planning Checklist: Children Going to College



- 1. Review College-Dedicated Assets vs Cost of Tuition
- 2. Review FAFSA Options
- 3. Review Payment Options (Federal Student Loans, Scholarships, Private Loans, 529 Plan, Retirement Accounts)
- 4. Consider a HELOC to Help Pay for Expenses
- 5. Create a Budget for Spending at College
- 6. Decide if a Credit Card is a Good Idea
- 7. Speak to an Attorney about HIPAA, POA, Healthcare Directives
- 8. Review Car Insurance
- 9. Review Health Insurance to Make Sure Student is Still Covered Properly at School (Especially if School is Out-of-State)
- 10. Review All of These Items with Your Financial Advisor

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