



Wealth is the ability to fully experience life.

Graduation from Pre-K

Congratulations – your child has just graduated from Pre-K! While you are now focused on choosing a primary school for your child, it's never too early to begin planning for future higher education expenses. Prudent planning helps determine the best way to balance saving for your child's education with other important financial goals like retirement planning.

FINANCES

- Budget
- Savings
- Asset/account structure
- Redeploy daycare expenses
- Using an allowance to teach your kids how to handle money

EDUCATION PLANNING

- Public vs. private school
- 529 Plan distributions and contributions
- Education IRA
- Contributions from parents, grandparents, and other family members
- Custodial accounts (UGMA/UTMA)

NOTES

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