



Wealth is the ability to fully experience life.

College Bound/Post Secondary Education

Heading off to college is a monumental step in a student's life. College-bound students need advice and guidance to learn how to best manage their money and develop positive habits around budgeting, spending, and responsible use of credit. This checklist is helpful for parents and students who are preparing their children for college.

PARENTS

Legal Documents

- Power of attorney (POA)
- Health care POA

College Funding

- Student loans
- FAFSA process
- Distribution planning for college
- Scholarship applications

Money Matters

- Bank accounts
- Credit card
- Verbalize money boundaries
- Freezing child credit

Phone Apps

- Uber

STUDENTS

Phone Apps

- Uber
- Venmo
- Campus
- Chegg
- Quizlet

Money Matters

- Bank accounts
- Credit card
- Balancing checkbook
- Establishing credit
- Budget
- Jobs for college students
- Guidance counselors

RESOURCES

- MyScholly.com
- [Facebook.com/FederalStudentAid](https://www.facebook.com/FederalStudentAid)
- [Twitter.com/FAFSA](https://twitter.com/FAFSA)
- [IRS Publication 970, Tax Benefits for Education](https://www.irs.gov/publications/p970)
- [Benefits of Federal vs. Private Student Loans](#)

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