

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 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

