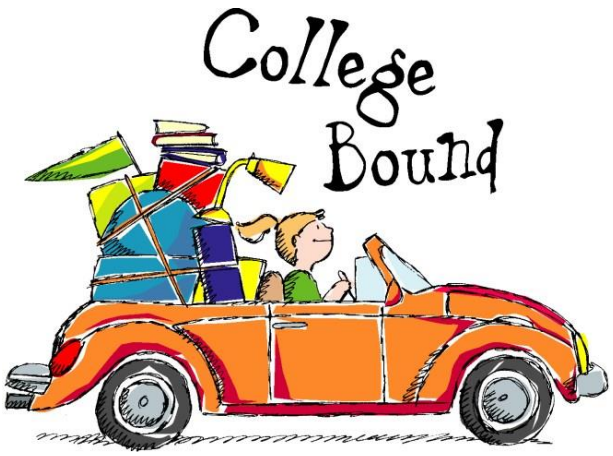
Harris Financial Group, Inc.

Life Event Planning Checklist

Children Going to College

- Review college-dedicated assets vs cost of tuition
- Review FASFA options
- Review payment options (Federal student loans, scholarships, private loans, 529 plan, retirement accounts)
- 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



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