



**CHECKLIST
DEPOT**



PREMIER
INSURANCE CONTRACTS INC.

SAVING FOR COLLEGE CHECKLIST

Hello,

My name is Al Castellanos and I am a licensed Insurance agent associated with the Checklist Depot. Do you know why checklist are important to have? Well I am here to give you that information. Checklist can help us stay more organized by assuring we don't skip any steps in a process. Seeing a list of what you must get done, instead of trying to remember it all, is going to save you a ton of time.

Saving For College Checklist is an important list to have. Saving for college not only increases access to a college education by spreading the cost over time, but it also maximizes choice. That way your child can choose the college that is most appropriate for their children, as opposed to the least expensive.

Things to know and do when saving for college:

General Information

- Gather all your relevant personal information
 - Child/Children's name and date of birth
 - Type of college child/children are intreated in (e.g., public, private, two-year or four-year)
 - Each parent's name and date of birth
 - Names and dates of birth of other children
- Assess your financial situation
 - Income
 - Expenses
 - Assets
 - Liabilities
 - Tax rate
 - Filing status

Estimating College Costs

- Have any savings already been earmarked for child/children's college?

- If yes, has average rate of return been estimated for these savings?
- Have grandparents earmarked any funds for child/children's college?
- Has type of college been narrowed? (e.g., public, private, two-year, or four-year)

Investment Planning

Specific Savings Options

These and many more tips may help you prepare to save for your child/children's college education, please check out the complete checklist and other important checklist at our website <https://www.prinsuco.com/Checklist.62.htm>.

If you have any questions regarding this checklist or any of the other checklist, please contact me at (281) 642-4082 or at alcastellanos@prinsuco.com.