

# College Planning

College planning shouldn't start when the first application is mailed. From specialized investment accounts to navigating financial aid, we help you integrate this major life event into your overall financial plan without compromising your own long-term aspirations.



## ***Tax-Advantaged Savings***

- 529 Plans
- Trump Accounts
- Asset Placement
- Insurance Vehicles



## ***Financial Aid Guidance***

- Student Aid Index
- FAFSA
- Scholarships
- Credits & Deductions



## ***Multi-Child Planning***

- Plan Integration
- Cash Flow Planning
- Debt Optimization
- Legacy 529s



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