

STARTING COLLEGE CHECKLIST



Is your student starting college soon?

College is a commitment. Please reference the list below for potential to-do items to consider when your loved one is starting their college adventure.

Talk to your financial professional about:

- A withdrawal strategy and the need to change any investment allocations

Additional action items:

- Consider talking to a legal professional about creating a medical power of attorney for your student so you may access their health records in the event of an emergency
- Regardless of whether your student is taking their car to college, consider contacting your insurance carrier to discuss possible rate changes
- Reach out to your home insurance provider to discuss options to protect your student's valuables while away from home
- Take pictures of your student's most valuable possessions in the event you have to make an insurance claim
- Check in with your health insurance provider to determine coverage availability for your student
- Consider talking to a tax professional about available higher education tax deductions