CHECKLIST · FINANCIAL MANAGEMENT

FREE PREVIEW

Setting Up a College Savings Account



Saving for college ensures you're prepared for tuition and other educational expenses. Use this checklist to establish a college savings account.

10 steps · Print-ready A4

NAME	START	TARGET DATE

1 Estimate Future Education Costs

Research tuition, fees, housing, and other expenses for your desired college or program.

EXAMPLE *"Public university costs $20,000 annually for in-state tuition, plus $10,000 for housing and supplies."*

2 Choose the Right Savings Plan

Research options like 529 plans, Coverdell ESAs, or savings accounts to find the best fit.

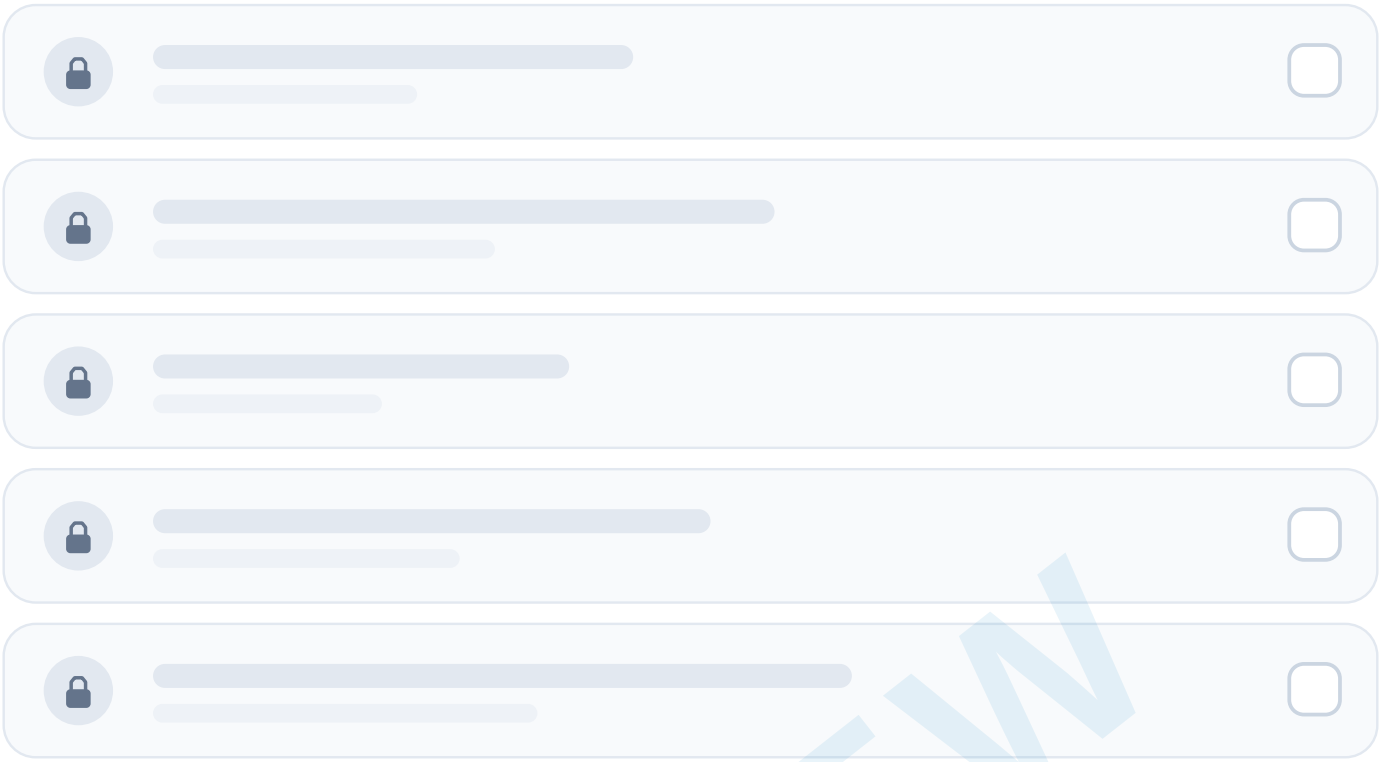
TIP *529 plans often offer state tax deductions or credits for contributions.*

3 Calculate Contribution Goals

Decide how much you need to save monthly to reach your target based on estimated costs.

EXAMPLE *"Save $200 per month for 10 years to reach $24,000, accounting for interest."*

PREVIEW



Like the design?

Get the full version: every step with examples and tips, a reflection page, no watermark.

Get the full version

PREVIEW