The purpose of this analysis is to provide a path towards college savings.

The analysis will illustrate the current shortfall and appropriate savings into either a 529 plan or a taxable account to fund college expenses.

Necessary information needed:

- Names of children, grandchildren, etc.
- Date of Births (D.O.B.) of children
- College preference
  - Specific College/University
  - Out-of-State Public
  - In-State Public
  - Private University
- Expected years of attendance
- Current College Savings