



College Funding Analysis

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.

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- 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