

Making Sense of Education Savings: What's Right for You?

Decisions around education savings can feel overwhelming, but they don't have to be! Whether you're saving for college, graduate school or some other educational credential, working alongside an advisor who understands the ins and outs of the available savings vehicles and their rules helps ensure that every decision you make is in the best interest of your goals and in concert with your overall financial plan.

If you're in the process of deciding on an education savings path, let this help guide your next conversation with your financial advisor.



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As you can see, there are a lot of variables when it comes to making an informed decision about saving for education expenses — your circumstances, your overall goals, your location, and many more. But when all the options are carefully considered, the outcome is an important first step in achieving one of life's most important goals. Remember, college planning involves much more than the choice of funding vehicle. When your child or grandchild reaches middle or high school, your advisor can help identify schools that are likely to prepare your student for a successful, fulfilling life as affordably as possible.