



J.K. Lasser Pro New Strategies for College Funding: An Advisor's Guide

Raymond D. Loewe

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A PROFESSIONAL GUIDE TO PLANNING FOR COLLEGE FUNDING A properly designed college savings plan is key to providing a college education as well as the best way to avoid any surprises. Yet many parents fail to realize how much time, money, and commitment are needed to accomplish this goal. As an advisor, you must guide your clients through this process with poise and confidence, and J.K. Lasser Pro New Strategies for College Funding: An Advisor's Guide with its companion CD-ROM will help you do just that. Filled with expert advice, real-world case studies, and invaluable tools, techniques, worksheets, and checklists, this comprehensive guide will allow you to connect with your clients and plan for their children's college education in the best way possible. Organized into three complementary sections, J.K. Lasser Pro New Strategies for College Funding will help you: Quantify the college problem for your clients and communicate effectively and motivationally to each of them by using tools such as The College Savings Calculator(TM), The Financial Aid Test(TM), and The College Funding Integrator(TM), as well as spreadsheets that allow you to calculate exactly what clients need to save on a monthly basis Choose the tools you need to implement the plan-Coverdell Education Savings Account (formerly the Education IRA), Qualified Tuition Savings, Prepaid Tuition Plans, Savings Bonds, and much more-while balancing income tax strategies, financial aid strategies, and control of money issues Put the plan together and build in appropriate exit strategies to give your plan the flexibility it needs And this is just a sampling of the expertise this book provides. Pick up J.K. Lasser Pro New Strategies for College Funding and find out how to create and implement a successful college savings plan that is right for each of your clients' personal needs and goals. Please visit our Web site at www.jklasser.com

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