

# Estate Planner's Guide to Planning for Children's & Grandchildren's Education

*Learn about particular approaches to education funding, along with the advantages and disadvantages of each*

Education can change the trajectory of a person's life, but education can be expensive. Proper planning can help make the associated costs more manageable. This new seminar explores approaches to saving for education and discussion of how to actually pay for the costs. Hear the faculty analyze the reasons particular approaches may be utilized, along with the advantages and disadvantages of each. Learn to properly counsel a variety of your clients on how to approach education funding in their particular situation.

## Agenda

- **What Are Some of the Approaches in Saving for Future Education Costs?**
  - 529 Plans
  - Irrevocable trusts
  - UTMA accounts
  - Parental savings
- **How to Actually Pay for Education Costs**
  - Filing the FAFSA (Free Application for Federal Student Aid) and its recent changes
  - Completing school-specific financial aid forms (such as CSS Profile)
  - Grants
  - Scholarships (merit and needs-based)
  - Savings (including vehicles noted above)
  - Gifts (tuition versus other costs)
  - Types of loans (and how to pay them off)
  - Gifts
  - Stipends for graduate school
  - Employment income
- **“Ask the Experts” Q&A Session**

## Faculty

Jody R King, JD, CPA, AEP®, CDFA®, RLP®, *Director of Wealth Planning, Fiduciary Trust Company, Boston, Chair*  
Bianca McLaughlin, *Fiduciary Trust Company, Boston*

## Dates & Location

Register at [www.mcle.org](http://www.mcle.org)

### LIVE WEBCAST

Tuesday, June 18, 2024  
9:30 am–11:30 am  
Program # 2240191WBC

### REBROADCAST

Wednesday, July 3, 2024  
9:00 am–11:00 am  
Program # 2240191RB1

### REBROADCAST

Thursday, July 11, 2024  
12:00 pm–2:00 pm  
Program # 2240191RB2

### ON DEMAND WEBCAST

View after Thursday, July 11, 2024  
Program # 2240191WBA

## Tuition *(includes written materials)*

- \$175
- \$157.50 MCLE Members
- \$87.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email [scholarships@mcle.org](mailto:scholarships@mcle.org).

## Materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

## CLE Credits

Earn up to 2 CLE credits



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