

EUSTACE ADVISORS

Saving and Investing Options for Children
A Workshop for Benefactors

DISCUSSION TOPICS

DEFINING GOALS AND PREFERENCES

- Education, retirement, lifestyle goals.
- Who will control the accounts?

UNDERSTANDING YOUR OPTIONS

- Education-centric plans.
- Retirement-centric plans.
- General savings/investment options.
- Specialized plans (trusts).

BUILDING A PLAN

- The importance of having a Plan.
- Assessing which options align with goals.
- Selecting applicable account/plan type(s).
- Setting up accounts and managing contributions.
- Communicating the plan.

ONGOING MAINTENANCE

- Comparing account progress vs. goals.
- Leveraging tax and subsidy benefits.
- Making adjustments to contributions, beneficiaries, investment choices as needed.

KEY TAKEAWAYS

WHO SHOULD ATTEND

Anyone making financial contributions or gifts on behalf of a child.

KEY BENEFITS

1. Understand the types of savings and investment accounts established for children.
2. Define a process to select which account(s) are best suited for the goals for the child.
3. Building a personalized plan for the child.

FOLLOW UP OPPORTUNITIES

Eustace Advisors clients will be helped with:

1. Defining savings goals and timeframes.
2. Defining the best options for the defined goals.
3. Developing a personalized action plan.

This workshop is for educational purposes only and does not constitute legal, tax, investment, or lending advice. Participants should consult qualified professionals regarding their specific circumstances.

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