



KELLEY & ASSOCIATES

COLLEGE ESTATE PLAN WORKBOOK

Do you have kids about to go off to college? If so, you should consider a College Estate Plan, which includes a Healthcare Power of Attorney and Financial Power of Attorney, which allows parents to retain some authority should your child get injured or to view their financial or grade status.

STUDENT INFORMATION:

Legal Name: _____
Date of Birth: _____ Social Security Number: _____
Address: _____

ASSIGNMENT OF AGENTS

Primary Agent: _____
Secondary Agent: _____
Tertiary Agent: _____

SPECIAL POWERS

COMPLETE

Once you have completed this Workbook, you have a few options:

- You can upload the document through our Contact Portal on our website at Kelley-assoc.com.
- You can scan it and send it to admin@kelley-assoc.com.
- You can mail or physically deliver it to our office at 255 E Rincon St. #211 Corona C 92879 as quickly as you can.

FIRM CONTACT

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