

# EDUCATION COST & SAVING ANALYSIS



Prepared For: \_\_\_\_\_

Date: \_\_\_\_\_

## Starter Goals

## Funding Strategy Analysis

Anticipated Total Cost	\$
Projected Accumulation of Savings	\$
Surplus/ Shortfall	\$

## Results

## Considerations to improve likelihood of success

Cost	\$
Funding	\$
Investment	\$

## Recommendations

# EDUCATION COST & SAVING ANALYSIS



Prepared For: \_\_\_\_\_

Date: \_\_\_\_\_

## Student Beneficiary

Name:

Relationship:

State of Residence:

Planned State of Attendance:

## Expectations

State:

Institution:

## Current Cost

Current Year: \$

Residence: \$

Tuition: \$

Books: \$

Room & Board: \$

Other Expenses: \$

Total Annual Expenses

\$

## Projected Costs

Years of Funding

Attendance begins (semester)

Assistance from: grants, scholarships, outside funds \$

Will you be funding Housing Arrangements

(on campus, off-campus, just covering tuition & fees) \$

Inflation Assumption %

Total Goal Expense \$

Inflation Assumption %

Total Goal Expense

\$

## Dedicated Savings

Account Type

Current Balance

Periodic Additions \$

Frequency of Additions \$

Current Allocation

Expected Rate of Return

## Dedicated Savings