



WEALTH MANAGEMENT



College Costs Planning Checklist

Tuition	COSTS	COMMENTS
<input type="checkbox"/> College Billing Fees		
<input type="checkbox"/> Interest and fees on student loans		

Miscellaneous Fees	COSTS	COMMENTS
<input type="checkbox"/> Student Health Center Fees		
<input type="checkbox"/> Student Health Insurance Fees		
<input type="checkbox"/> Student Activity Fees		
<input type="checkbox"/> Orientation Fee		
<input type="checkbox"/> Matriculation Fees (New students only)		
<input type="checkbox"/> Graduation/Commencement Fees		
<input type="checkbox"/> Academic Transcript Fees		
<input type="checkbox"/> Technology Fee		
<input type="checkbox"/> Printing Fee		

Study Abroad	COSTS	COMMENTS
<input type="checkbox"/> Travel Costs		
<input type="checkbox"/> Housing Costs		
<input type="checkbox"/> Entertainment Costs		
<input type="checkbox"/> Dining Costs		

Educational Resources	COSTS	COMMENTS
<input type="checkbox"/> Required Textbooks (Renting vs Buying)		
<input type="checkbox"/> Private Tutoring		
<input type="checkbox"/> Newspapers and Magazines		

Technology	COSTS	COMMENTS
<input type="checkbox"/> Computer Purchase		
<input type="checkbox"/> Accessories (cables and wires)		
<input type="checkbox"/> Software Applications (Dropbox, LastPass, Microsoft Office, etc.)		
<input type="checkbox"/> Television Purchase		
<input type="checkbox"/> Entertainment Subscriptions (Netflix, Amazon Prime, Hulu, etc.)		

Dorm Room/Apartment	COSTS	COMMENTS
<input type="checkbox"/> Bedding		
<input type="checkbox"/> Lamps		



Dorm Room/Apartment Contd.	COSTS	COMMENTS
<input type="checkbox"/> Towels		
<input type="checkbox"/> Decorations		
<input type="checkbox"/> Furniture (Futon)		
<input type="checkbox"/> Laundry Basket		
<input type="checkbox"/> Waste Basket		
<input type="checkbox"/> Whiteboard/Bulletin Board		
<input type="checkbox"/> Hair Dryer		
<input type="checkbox"/> Appliances (Microwave, Refrigerator, Toaster Oven, etc.)		
<input type="checkbox"/> Entertainment Systems (PS4, Xbox, etc.)		
Personal Hygiene	COSTS	COMMENTS
<input type="checkbox"/> Laundry Detergent		
<input type="checkbox"/> Laundry Machine Funds		
<input type="checkbox"/> Soap and Shampoo		
<input type="checkbox"/> Hair Care		
<input type="checkbox"/> Cosmetics		
Off-Campus Housing	COSTS	COMMENTS
<input type="checkbox"/> Rent		
<input type="checkbox"/> Security Deposit		
<input type="checkbox"/> Utility Deposit		
<input type="checkbox"/> Renter's Insurance		
<input type="checkbox"/> Utilities		
<input type="checkbox"/> Parking Space		
<input type="checkbox"/> Summer Storage Fees		
Off-Campus Dining	COSTS	COMMENTS
<input type="checkbox"/> Late Night Dining		
<input type="checkbox"/> Beverages (Starbucks, Vending Machines, etc.)		
Travel To and From Home	COSTS	COMMENTS
<input type="checkbox"/> Fall Break (Thanksgiving)		
<input type="checkbox"/> Winter Break (Christmas)		
<input type="checkbox"/> Spring Break		
<input type="checkbox"/> Summer Break		

College Costs Planning Checklist

Car	COSTS	COMMENTS
<input type="checkbox"/> Auto Insurance		
<input type="checkbox"/> Fuel		
<input type="checkbox"/> Maintenance/Repairs		
<input type="checkbox"/> Parking Fees		
Other Travel	COSTS	COMMENTS
<input type="checkbox"/> Public Transportation Passes		
<input type="checkbox"/> Train Tickets		
<input type="checkbox"/> Uber/Taxi		
Cell Phone	COSTS	COMMENTS
<input type="checkbox"/> Cost of Phone		
<input type="checkbox"/> Phone Service Charges		
Clothing	COSTS	COMMENTS
<input type="checkbox"/> Seasonal Attire		
<input type="checkbox"/> Formal attire for job interviews and internships		
Campus Activities	COSTS	COMMENTS
<input type="checkbox"/> Greek Membership Fees		
<input type="checkbox"/> TSponsored Activities or Club Events		
Entertainment	COSTS	COMMENTS
<input type="checkbox"/> Athletic Events		
<input type="checkbox"/> Movies		
<input type="checkbox"/> Concerts		
<input type="checkbox"/> Music (Pandora, Spotify, etc.)		