

THE PARENT'S FINANCIAL PREP LIST: 7 SMART STEPS FOR RAISING (AND FUNDING) A FAMILY



- 1. Open a College Savings Account**
Consider a plan to grow education savings tax-free.
- 2. Revisit Your Budget as a Team**
Plan together. Baby costs add up—formula, diapers, daycare.
- 3. Set Up or Review Your Will**
Safeguard your family by naming guardians and beneficiaries.
- 4. Review Life Insurance**
Term policies are affordable and can help reduce worry about “what ifs”.
- 5. Start a ‘Kid Fund’ for Unexpected Costs**
Think braces, sports gear, or last-minute field trips.
- 6. Explore Childcare Tax Credits**
You might qualify for helpful tax deductions or credits.
- 7. Plan Your Parental Leave**
Understand your workplace benefits and plan for the time off.



Want to chat through any of it with Matt?

Who the heck is Matt?

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