

## Successful College Funding: A Tax Professional's Guide

October 1, 2, 3 or 4, 2007

**Seminar Objectives:** As a result of attending this seminar, you will be able to:

- Analyze the financial aid process.
- Maximize education tax benefits for your clients.
- Explore tax advantaged ways to save for college.
- Discuss tax implications of scholarships, grants, gifts and alternative ways to pay for college.

### **Seminar Agenda:**

8:30 a.m.	Introduction and Cost of College
9:00 a.m.	Financial Aid
10:15 a.m.	Break
10:30 a.m.	Financial Aid (continued)
11:00 a.m.	Tax Incentives
Noon	Lunch (on your own)
1:00 p.m.	Tax Incentives (continued)
1:30 p.m.	Saving for College
2:30 p.m.	Break
2:45 p.m.	Saving for College (continued)
3:30 p.m.	Education Provisions in Tax Code
4:15 p.m.	Borrowing for College
4:45 p.m.	Adjourn