

GETTING GOOD ADVICE

Working with your advisor to save for education

Questions to ask

Your advisor will want you to be comfortable with any recommended strategies or investments.

The following questions can help ensure you fully understand how a strategy or investment will help you achieve your education-savings goals.

For recommended strategies

How will this strategy help me realize my education-savings goals?

What impact will it have on my other financial priorities?

What are the risks associated with this strategy?

What will this strategy cost me now, and when the time comes to use the money?

For recommended investments

Why are you recommending this investment?

How will this investment contribute to my education-savings goals?

What risks are associated with the investment?

What will it cost me now, and in the future?

What is the performance record of this investment?

Will this investment be easy to liquidate when money is needed for education?

Who manages the investment? (Applicable to products such as mutual funds and segregated funds)

Are you receiving fees for the sale of this product? How much will you be compensated?
