

EDUCATION FUNDING



DONALDSON
CAPITAL MANAGEMENT

INVESTING IN THEIR FUTURE

Helping a child or grandchild pursue education can be one of the most rewarding financial goals. With thoughtful planning, you can support their future while staying true to with your broader financial vision.

We'll guide you through options like:

- 529 Plans
- UTMA Accounts
- Roth IRAs
- A variety of trust structures

Together, we'll identify the strategies that may match your family's goals, timeline and resources.

Want to see how this fits into your plan?

Ask your advisor for a sample report.



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