



ANCHOR
WEALTH STRATEGIES

Don't Forget to RSVP for our
Cheers to Growth Open House.

[Click Here to RSVP](#)



5 Reasons Grandparents Should Open a 529 Plan

- Tax-Free Growth – Earnings and qualified withdrawals are federal tax-free.
- Estate Planning Advantage – Contributions can reduce your taxable estate.
- Front-Load Contributions – Give up to 5 years' worth of gifts at once.
- You Stay in Control – Decide how and when funds are used.
- Leave a Lasting Legacy – Invest in your grandchild's future education.

Float into retirement knowing their future is taken care of.

[EXPLORE YOUR OPTIONS](#)

Fun Fact:

You can use a 529 plan for more than college; think trade schools, certifications, and even K-12 tuition in some cases.

Small Gifts. Big Future

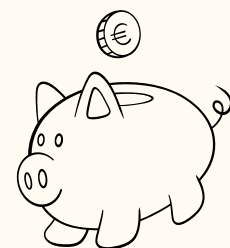
A grandparent setting aside just \$20/month + \$20 for birthdays & holidays

adds up to:

\$5,400 saved over 18 years

estimated \$9,000–\$10,000 with a 529 plan

That's the power of consistency.



Use the 529 Grandparent Loophole to Maximize College Savings

A 529 plan can be a great way to save for your grandkids' college education, and it is now easier to use in conjunction with financial aid.

Thanks to the FAFSA Simplification Act, the notoriously frustrating process of applying for student aid has been streamlined. The Simplification Act removed more than two-thirds of the questions on the FAFSA form (PDF).

Better yet, the FAFSA now lets grandparents with 529 accounts take advantage of the grandparent loophole to fund a child's education without derailing their financial aid application.

[Click Here to Continuing to Read](#)

The best time to start was yesterday. The next best time is today.

Schedule with us now and let's make their dreams a reality.

Fun Fact:

Since 1996, 529 plans have helped families and grandparents turn small, consistent gifts into future education funding.

[SCHEDULE ONLINE](#)

Let's Stay Anchored



Judy Polak, CFP®

LPL Financial
Advisor

judy.polak@lpl.com
817-778-0628



KNOW SOMEONE
WHO COULD USE A
FINANCIAL
ANCHOR?

Referrals are the highest compliment we can receive.

If you have a friend, colleague, or family member who could benefit from personalized financial advice, we'd love to help them too!

NEED A CHECK-IN OR HAVE QUESTIONS? I'M JUST A CALL OR CLICK AWAY!

Available for in-person or virtual meetings—just reach out!

Securities and advisory services offered through LPL Financial, a registered investment advisor, Member FINRA/SIPC.

The information contained in this email message is being transmitted to and is intended for the use of only the individual(s) to whom it is addressed. If the reader of this message is not intended recipient, you are hereby advised that any dissemination, distribution or copying of this message is strictly prohibited. If you have received this message in error, please immediately delete.