

2016-17 Qualified Education Benefits

(For Benefits Received January 2015 – December 2015)

Student Name: _____ **BSU ID #:** _____
(Please Print)

Student Phone #: _____ **Parent Phone #:** _____
(If Applicable)

We have been notified that you received tuition assistance from a qualified tuition program (also known as section 529 plans) during the 2015 year. Please provide us with the following information as soon as possible to avoid any possible delays in the awarding of Federal aid.

Type of Qualified Education Benefit (select appropriate one):

- _____ Prepaid Tuition Plan
 _____ College Savings Plan or Coverdell Education Savings Account
 _____ Other: _____

| PREPAID TUITION PLANS | |
|--|--|
| List the current balance of tuition plan credits or certificates. | \$ _____ |
| List the name of plan owner. | _____ |
| List the plan owner's relationship to student. | _____ |
| List the amount used or received in 2015. | \$ _____ |
| Was any benefit amount received in 2015 reported on the 2015 Federal Tax Return? | [] No [] Yes If yes, list amount: \$ _____ |
| Was any benefit amount received in 2015 reported on the 2016-2017 FAFSA application? | [] No [] Yes If yes, list amount: \$ _____ |
| If yes, indicate how it was reported on the 2016-2017 FAFSA application. | [] Untaxed Income [] Asset |
| COLLEGE SAVINGS PLAN or COVERDELL EDUCATION SAVINGS ACCOUNT | |
| List the current balance of the savings plan/account. | \$ _____ |
| List the name of plan/account owner. | _____ |
| List the plan/account owner's relationship to student. | _____ |
| List the amount used or received in 2015. | \$ _____ |
| Was any benefit amount received in 2015 reported on the 2015 Federal Tax Return? | [] No [] Yes If yes, list amount: \$ _____ |
| Was any benefit amount received in 2015 reported on the 2016-2017 FAFSA application? | [] No [] Yes If yes, list amount: \$ _____ |
| If yes, indicate how it was reported on the 2016-2017 FAFSA application. | [] Untaxed Income [] Asset |

I certify the information provided above is true. I understand if I use false information to establish eligibility for federal student aid, I could be subject to a fine, jail, or both.

Student Signature: _____ **Date:** _____

Parent Signature: _____ **Date:** _____
(If Applicable)