

2017-2018 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?	<input type="checkbox"/> No <input type="checkbox"/> Yes If yes, list amount: \$ _____
Was any benefit amount received in 2015 reported on the 2017-2018 FAFSA application?	<input type="checkbox"/> No <input type="checkbox"/> Yes If yes, list amount: \$ _____
If yes, indicate how it was reported on the 2017-2018 FAFSA application.	<input type="checkbox"/> Untaxed Income <input type="checkbox"/> 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?	<input type="checkbox"/> No <input type="checkbox"/> Yes If yes, list amount: \$ _____
Was any benefit amount received in 2015 reported on the 2017-2018 FAFSA application?	<input type="checkbox"/> No <input type="checkbox"/> Yes If yes, list amount: \$ _____
If yes, indicate how it was reported on the 2017-2018 FAFSA application.	<input type="checkbox"/> Untaxed Income <input type="checkbox"/> 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)