

**Qualified Education Benefits  
 Assessment Form  
 2009-2010**

Student Financial Aid has received information that indicates you may be utilizing qualified education benefits or funds from an education savings account to help meet your university fees. Qualified education benefits and education savings accounts include prepaid tuition plans offered by states such as the Ohio Tuition Trust Authority (also known as 529 prepaid tuition plans), qualified tuition programs such as College Advantage (also known as 529 savings plans), and Coverdell education savings accounts.

Report below the refund value of the type of qualified education benefits plan or education savings account you are utilizing. Include in the amount reported any withdrawals made to pay for tuition/fees for the academic year 2009-2010. The refund value is defined by the U. S. Department of Education as the cash amount the owner of the plan would receive if the account were liquidated as of the date the FAFSA is signed. The value of accounts held for siblings must also be reported. Use a separate piece of paper to report sibling account information if necessary.

**STUDENT'S FIRST/LAST NAME:** \_\_\_\_\_ **BGSU ID :** \_\_\_\_\_

**CHECK THE APPLICABLE PLAN BELOW AND REPORT THE REFUND VALUE OF THE PLAN AS OF THE DATE THE FAFSA WAS SIGNED.**

- PREPAID TUITION PLANS/QUALIFIED TUITION PROGRAMS** (OTTA, Ohio's College Advantage or other 529 plans from a state other than Ohio):

Who is the owner or custodian of this account? \_\_\_\_\_

What is the cash value of this account? \$ \_\_\_\_\_

Was the value of this plan included in assets you reported on the FAFSA? Yes      No

- COVERDELL EDUCATION SAVINGS ACCOUNT:**

Who is the owner or custodian of this account? \_\_\_\_\_

What is the cash value of this account? \$ \_\_\_\_\_

Was the value of this plan included in assets you reported on the FAFSA? Yes      No

- OTHER.** Please describe: \_\_\_\_\_

Who is the owner or custodian of this account? \_\_\_\_\_

What is the cash value or balance of this account? \$ \_\_\_\_\_

Was the value of this plan included in assets you reported on the FAFSA? Yes      No

**SIGN THIS WORKSHEET**

Each person signing this form certifies that all the information reported on it is complete and correct. The student and at least one parent must provide a signature and date.

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

\_\_\_\_\_  
 Student Date

\_\_\_\_\_  
 Parent Date

**Mail this worksheet to:**

Bowling Green State University, Student Financial Aid, 231 Administration Building, Bowling Green, Ohio 43403-0114

Faxed copies are accepted and may be faxed to 419-372-0404.

If you need assistance completing this form you may contact a financial aid advisor by calling 419-372-2651, M-F, 8:00 am – 5:00 pm.