

**Qualified Education Benefits
Assessment Form
2011-2012**

Student Financial Aid

Student Financial Aid has received information indicating 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. The majority of college savings plans are paid directly to the school's billing office.

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 2011-2012. For most plans 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 cashed in as of the date the FAFSA is filed. 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 FILED.

- 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 is complete and correct. The student and at least one parent must provide a signature and date.

Student Date

Parent Date

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

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.

Ask your questions online using our secure web portal at sfa.bgsu.edu/asksfa