

# ▶ Financial aid information request form for the 2015-2016 school year

## Important information for students and parents from the Indiana Education Savings Authority

### Did you know . . .

. . . that along with all of the tax advantages you can get from a CollegeChoice Advisor 529 Savings Plan account, the assets in your account might not affect your student's chances of receiving state financial aid?

According to Indiana law, and under certain conditions (see criteria list to the right), the amount of money available in a CollegeChoice Advisor account and the proposed use of money in that account on behalf of a beneficiary may not be included when determining state grant award eligibility.

Since federal law requires that 529 plan assets be included on a FAFSA, information is needed directly from the account owner and the beneficiary to properly calculate a student's eligibility.

**NOTE:** To be considered for the 2015-2016 school year, the CollegeChoice Advisor 529 Savings Plan financial aid information request form must be faxed by the deadline of **March 31, 2015**.

#### Complete the form **ONLY** if:

- The Free Application for Federal Student Aid (FAFSA) has been filed and received by the Federal Processor by **March 10, 2015; and**
- The account owner is a parent who has completed the 2015-2016 FAFSA for their child; *and* the child is a student planning to attend an Indiana post-secondary institution that is eligible\* to receive state aid for the 2015-2016 year; *and* is an Indiana resident; **or**
- The student has completed the 2015-2016 FAFSA; *and* is considered an independent student for financial purposes; *and* is planning to attend an Indiana post-secondary institution that is eligible\* to receive state aid for the 2015-2016 year; *and* is an Indiana resident.

\* Please see attached list of eligible Indiana post-secondary institutions.

For more information about the CollegeChoice Advisor 529 Savings Plan (CollegeChoice Advisor), contact your financial advisor, call 1.866.485.9413, or visit [collegechoiceadvisor529.com](http://collegechoiceadvisor529.com) to obtain a Disclosure Statement, which includes investment objectives, risks, charges, expenses, and other important information; read and consider it carefully before investing. Ascensus Broker Dealer Services, Inc. (ABD) is Distributor of CollegeChoice Advisor.

**If you are not an Indiana taxpayer; consider before investing whether your or the beneficiary's home state offers any state tax or other benefits that are only available for investments in such state's qualified tuition program.**

CollegeChoice Advisor is administered by the Indiana Education Savings Authority (Authority). ABD, the Program Manager, and its affiliates, have overall responsibility for the day-to-day operations, including investment advisory, recordkeeping and administrative services, and marketing. CollegeChoice Advisor's Portfolios invest in: (i) exchange-traded funds; (ii) mutual funds; or (iii) an FDIC-insured omnibus savings account held in trust by the Authority at Sallie Mae Bank. Except for the Savings Portfolio, investments in CollegeChoice Advisor are not insured by the FDIC. Units of the Portfolios are municipal securities and the value of the units will vary with market conditions.

Investment returns will vary depending upon the performance of the Portfolios you choose. Except to the extent of FDIC insurance available for the Savings Portfolio, depending on market conditions, you could lose all or a portion of your money by investing in CollegeChoice Advisor. Account Owners assume all investment risks as well as responsibility for any federal and state tax consequences.

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**Not FDIC-Insured (except for the Savings Portfolio). No Bank, State, or Federal Guarantee. May Lose Value.**

# Financial aid information request form

**NOTE:** This form must be received by **March 31, 2015** to be considered for the 2015-2016 academic year.

## Use this form ONLY if:

- The Free Application for Federal Student Aid (FAFSA) has been filed and received by the Federal Processor by **March 10, 2015; and**
- The current account owner is a parent: **1)** who has completed the 2015-2016 FAFSA for their child as a **dependent** for financial aid purposes; *and* **2)** whose student plans to attend an Indiana post-secondary institution that is eligible\* to receive state aid for the 2015-2016 year; *and* **3)** both the parent and student are Indiana residents; **OR**
- The student is considered **independent** for financial aid purposes *and:* **1)** has completed the 2015-2016 FAFSA (no parental information); *and* **2)** plans to attend an Indiana post-secondary institution that is eligible\* to receive state aid for the 2015-2016 year; *and* **3)** is a permanent Indiana resident.

**Please fax your completed form by March 31, 2015 to 317.232.3260.**

**Attention:** CollegeChoice Advisor 529 Savings Plan

### Current account owner information

Name (first, m.i., last)

Street address

City, State, Zip

Social Security number

Email address

Daytime phone

### Current beneficiary (student) information

Name (first, m.i., last)

Social Security number

Date of birth (mm/dd/yyyy)

### 529 account information (Complete only ONE of sections A or B below)

**A. To be completed by the parent(s) who completed the FAFSA with parental data for the student considered as a dependent student for financial aid purposes.**

- What was the total amount of money reported as the net worth of **current investments** on the 2015-2016 FAFSA?
- Of the total amount reported as current investments listed on the FAFSA, what amount was reported as the **parent's portion** (as the account owner of the CollegeChoice Advisor account)?

\$ \_\_\_\_\_

\$ \_\_\_\_\_

**B. To be completed by the student who completed the FAFSA as an Independent Student for financial aid purposes.**

- What was the total amount of money that you, the student, reported as the net worth of **current investments** on the 2015-2016 FAFSA?
- As the student owner of the account, of the total amount reported as current investments listed on the FAFSA, what amount was reported from the CollegeChoice Advisor account?

\$ \_\_\_\_\_

\$ \_\_\_\_\_

Account owner's signature

Date

2015-2016 ELIGIBLE POST-SECONDARY INSTITUTION LIST—CURRENT AS OF 12/2014

SCHOOL	CODE	SCHOOL	CODE
Alexandria School of Scientific Therapy	035383	Indiana University Purdue University — Columbus	E01033
Ancilla College	001784	Indiana University Purdue University — Fort Wayne	001828
Anderson University	001785	Indiana University Purdue University — Indianapolis	001813
Apex School of Beauty Culture, Inc.	013918	Indiana Wesleyan University	001822
Art Institute of Phoenix (Art Institute of Indianapolis)	E01224	International Business College — Fort Wayne	014207
Art Institute of Phoenix (Brown Mackie College — Fort Wayne)	E01445	International Business College — Indianapolis	E00664
Art Institute of Phoenix (Brown Mackie College — Indianapolis)	E01389	ITT Technical Institute — Fort Wayne	008329
Art Institute of Phoenix (Brown Mackie College — Merrillville)	014607	ITT Technical Institute — Indianapolis	007329
Art Institute of Phoenix (Brown Mackie College — Michigan City)	E01412	ITT Technical Institute — Merrillville	E01967
Art Institute of Phoenix (Brown Mackie College — South Bend)	004583	ITT Technical Institute — Newburgh	007327
Associated Mennonite Biblical Seminary	001823	ITT Technical Institute — South Bend	E01966
Avant Gard the School	041717	Ivy Tech Community College (all campuses)	009917
Aveda Fredric's Institute	041559	J Michael Harrold Beauty Academy	009515
Aviation Institute of Maintenance	031763	Kaplan College — Hammond	E01100
Ball State University	001786	Kaplan College — Indianapolis South	E01635
Bethany Theological Seminary	G01637	Kaplan College — Merrillville	015564
Bethel College	001787	Knox Beauty College	016692
Butler University	001788	Lafayette Beauty Academy	010409
Calumet College of St. Joseph	001834	Lil Lou's Barber College	042055
Chamberlain College Of Nursing — Indiana	E02182	Lincoln College of Technology — Indianapolis	007938
Christian Theological Seminary	G01789	Manchester College	001820
College Of Court Reporting	026158	Marion Community Tucker Area Vocational School	031006
Concordia Theological Seminary	G20876	Marian University	001821
Creative Hair Styling Academy	011505	Martin University	014975
Crossroads Bible College	034567	Masters of Cosmetology College	016324
Daymar College — Rockport	E01916	Med Tech College — Fort Wayne	E01506
DePauw University	001792	Med Tech College — Greenwood	E01386
Don Roberts Beauty Schools	014523	Med Tech College — Indianapolis	007362
Don Roberts School Of Hair Design	013998	Merrillville Beauty College	009613
Earlham College	001793	Mid-America College Funeral Service	010618
Everest Institute — Everest College	E01317	National College	E01954
Excel Academies of Cosmetology — Merrill	042303	National College — Indianapolis	010489
Fortis College	E01820	National College — South Bend	E01914
Franklin College	001798	Oakland City University	001824
Goshen College	001799	Paul Mitchell, the School — Indianapolis	041840
Grace College	001800	PJ's College of Cosmetology	015806
Hanover College	001801	Purdue University — Calumet	001827
Hair Arts Academy	026070	Purdue University — North Central	001826
Hair Fashions by Kaye Beauty College	016688	Purdue University — West Lafayette	001825
Harrison College — Anderson	015227	Ravenscroft Beauty College	014273
Harrison College — Columbus	015226	Rem Spa Inc.	041667
Harrison College — Elkhart	E01294	Roger's Academy of Hair Design	016593
Harrison College — Evansville	E00778	Rudae's School of Beauty Culture	009673
Harrison College — Fort Wayne	E00931	Rose-Hulman Institute of Technology	001830
Harrison College — Indianapolis	015218	Saint Elizabeth's School of Nursing	006257
Harrison College — Indianapolis East	E00777	Saint Joseph's College	001833
Harrison College — Lafayette	015224	Saint Mary's College	001836
Harrison College — Indianapolis Northwest	E01209	Saint Mary-of-the-Woods College	001835
Harrison College — Muncie	015222	Salon Professional Academy (The)	041727
Harrison College — Terre Haute	015220	Success Schools	041003
Holy Cross College	007263	Taylor University — Upland	001838
Honors Beauty College	041309	Techskills — Indianapolis	041210
Huntington University	001803	Trine University/Angola/Fort Wayne/ South Bend	001839
Ideal Beauty Academy	040387	University of Evansville	001795
Indiana Institute of Technology	001805	University of Indianapolis	001804
Indiana State University	001807	University of Notre Dame	001840
Indiana University — Bloomington	001809	University of Saint Francis	001832
Indiana University — Kokomo	001814	University of Southern Indiana	001808
Indiana University — South Bend	001816	Valparaiso University	001842
Indiana University East (Richmond)	001811	Vincennes University	001843
Indiana University Northwest (Gary)	001815	Wabash College	001844
Indiana University Southeast (New Albany)	001817	WGU Indiana	033394