

# ▶ Financial aid information request form for the 2018-2019 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 2018-2019 school year, the CollegeChoice Advisor 529 Savings Plan financial aid information request form must be faxed by the deadline of **April 15, 2018**.

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

- The Free Application for Federal Student Aid (FAFSA) has been filed and received by the Federal Processor by **April 15, 2018**; **and**
- The account owner is a parent who has completed the 2018-2019 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 2018-2019 year; *and* is an Indiana resident; **or**
- The student has completed the 2018-2019 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 2018-2019 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, LLC (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 state benefits such as financial aid, scholarship funds, and protection from creditors that are only available for investments in that 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 NexBank. 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 **April 15, 2018** to be considered for the 2018-2019 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 **April 15, 2018; and**
- The current account owner is a parent: **1)** who has completed the 2018-2019 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 2018-2019 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 2018-2019 FAFSA (no parental information); **and 2)** plans to attend an Indiana post-secondary institution that is eligible\* to receive state aid for the 2018-2019 year; **and 3)** is a permanent Indiana resident.

**Please fax your completed form by April 15, 2018 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 2018-2019 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 2018-2019 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

\* See attached list of eligible Indiana schools.

2018-2019 ELIGIBLE POST-SECONDARY INSTITUTION LIST — CURRENT AS OF 12/2016

SCHOOL	CODE	SCHOOL	CODE
Alexandria School of Scientific Therapy	035383	Indiana University - Bloomington	001809
Ancilla College	001784	Indiana University - Fort Wayne	E40457
Anderson University	001785	Indiana University - Southeast	001817
Art Institute of Phoenix (The)	E01224	Indiana Wesleyan University	001822
Associated Mennonite Biblical Sem	001823	International Business College	E00664
Avant Gard The School	041717	International Business College	014207
Aveda Fredric's Institute	041559	ITT Technical Institute South Bend	E01966
Aviation Institute of Maintenance	031763	ITT Technical Institute Merrillville	E01967
Ball State University	001786	ITT Technical Institute Greenwood	E01968
Bethany Theological Seminary	G01637	ITT Technical Institute Newburgh	007327
Bethel College Inc	001787	ITT Technical Institute Indianapolis	007329
Brightwood College	015564	ITT Technical Institute Fort Wayne	008329
Brightwood College - Indianapolis	E01635	Ivy Tech Community College of Indiana	009917
Brown Mackie - Fort Wayne	E01445	J Michael Harrod Beauty Academy	009515
Brown Mackie - Indianapolis	E01389	Kenny's Academy of Barbering	042562
Brown Mackie - Merrillville	014607	Knox Beauty College	016692
Brown Mackie - South Bend	004583	Lil Lou's Beauty And Barber College Llc	042055
Butler University	001788	Lincoln College of Technology	007938
Calumet College of Saint Joseph	001834	Manchester University	001820
Chamberlain College of Nursing - Indiana	E02182	Marian University	001821
Christian Theological Seminary	G01789	Martin University	014975
College of Court Reporting	026158	Mid-America Clg Funeral Service	010618
Concordia Theological Seminary	G20876	National College - South Bend	E01914
Crossroads Bible College	034567	Oakland City University	001824
Depauw University	001792	Paul Mitchell The School Indianapolis	041840
Devry University - Merrillville	E02168	PJ's College of Cosmetology - Clarksville	015806
Don Roberts Beauty Schools	014523	PJ's College of Cosmetology - Richmond	016289
Don Roberts School of Hair Design	013998	Purdue University Nw Hammond/Westville	001827
Earlham College	001793	Purdue University	001825
Earlham School of Religion	E00170	Radiological Technologies University Vt	042328
Excel Academies of Cosmetology - Merrill	042303	Ravenscroft Beauty College	014273
Fortis College - Indianapolis	E01820	Rem Spa Inc	041667
Franklin College of Indiana	001798	Roger's Academy of Hair Design	016593
Goshen College	001799	Rose Hulman Institute of Technology	001830
Grace College & Theo Seminary	001800	Ross Medical Education Center	E01829
Hair Fashions By Kaye Beauty College	016691	Rudae's School of Beauty Culture	009673
Hanover College	001801	Saint Elizabeth School of Nursing	006257
Harrison College - Indianapolis	015218	Saint Mary-of-the-Woods College	001835
Harrison College - Anderson	015227	Saint Meinrad School of Theology	G07276
Harrison College - Columbus	015226	Salon Professional Academy (The) - Evansville	041727
Harrison College - East	E00777	Salon Professional Academy (The) - Kokomo	041866
Harrison College - Elkhart	E01294	St Mary's College	001836
Harrison College - Evansville	E00778	Success Schools	041003
Harrison College - Fort Wayne	E00931	Taylor University	001838
Harrison College - Lafayette	015224	Techskills - Indianapolis	041210
Harrison College - Northwest	E01209	Textures Institute of Cosmetology	042466
Harrison College - Terre Haute	015220	Tricoci University of Beauty Culture - Lafayette	010409
Holy Cross College	007263	Tricoci University of Beauty Culture - Highland	011505
Huntington University	001803	Tricoci University of Beauty Culture - Bloomington	026070
Ideal Beauty Academy	040387	Tricoci University of Beauty Culture - Indianapolis	041309
Indiana College of Sports & Medical Mass	042561	Trine University	001839
Indiana Institute of Technology	001805	University of Evansville	001795
Indiana State University	001807	University of Indianapolis	001804
Indiana University Kokomo	001814	University of Notre Dame	001840
Indiana University - East	001811	University of Saint Francis	001832
Indiana University - Northwest	001815	University of Southern Indiana	001808
Indiana University - Purdue University Fort Wayne	001828	Valparaiso University	001842
Indiana University - Purdue University Columbus	E01033	Vincennes Beauty College	010151
Indiana University - Purdue University Indianapolis	001813	Vincennes University	001843
Indiana University - South Bend	001816	Wabash College	001844