

529 College Savings Plans

FAFSA Checklist

This one page checklist helps answer the question:
What information do I need when I fill out the Free
Application for Federal Student Aid (FAFSA)?

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What information do I need when I fill out the Free Application for Federal Student Aid (FAFSA)?

- ✓ Student's Social Security number
- ✓ Parent's Social Security numbers (for dependent students)
- ✓ Student's Driver's License number if they have one
- ✓ Student's Alien Registration number if not a U.S. citizen
- ✓ Federal tax information or tax returns (IRS 1040, 1040A, 1040EZ) including IRS W-2 information, for the student (and the student's spouse if married)
- ✓ Federal tax information or tax returns (IRS 1040, 1040A, 1040EZ) including IRS W-2 information, for the parent (dependent students only)
 - You will use your prior-prior year income. For example, you report your 2016 income for the 2018-19 FAFSA
- ✓ Records of your untaxed income, such as child support received, interest income, veterans non-education benefits for the student and the parents for dependent students if you are providing parent information
- ✓ Information on cash; savings and checking account balances; investments, including real estate but not including the home in which you live; and business and farm assets for the student and parents for dependent students
 - Include all 529 savings plans, 529 pre-paid plans and Coverdells owned by the student and parent for dependent students
 - Include all securities, investments, mutual funds, bank accounts, CDs, UTMA/UGMA, minor trusts, savings bonds, business interests, real estate and cash held in the student's name
 - Include all securities, investments, mutual funds, bank accounts, CDs, savings bonds, business interests, real estate and cash owned by the parent for dependent students
 - Do not include 529 plans owned by a non-parent (i.e. grandparent), retirement accounts such as IRAs or 401(k), equity in your primary home, a family-owned business, insurance policies and annuities

It is recommended that you fill out the FAFSA online at www.fafsa.ed.gov for faster results and ease of use. For more information please visit www.fafsa.ed.gov or call 1-800-4-FED-AID (1-800-433-3243).

Investors should consider the investment objectives, risks, charges and expenses associated with a 529 Plan before investing. This and other information is available in a Plan's official statement. The official statement should be read carefully before investing.

Depending on your state of residence, there may be an in-state plan that provides tax and other benefits such as financial aid, scholarships and creditor protection that are not available through an out-of-state plan. Before investing in any state's 529 plan, you should consult your tax advisor.