

Asset Information Worksheet for 2008-2009

STUDENT NAME: _____

DATE: _____

DIRECTIONS: Complete all items below and return this form to the Financial Aid Office. **ASSET INFORMATION SHOULD REFLECT VALUE AT THE TIME THE FAFSA WAS COMPLETED.** For each question, if net worth is one million dollars or more, enter \$999,999. If net worth is negative, enter 0. Round all figures to the nearest whole dollar.

SECTION 1: ASSET INFORMATION

As of the day you filed your 2008-2009 Free Application for Federal Student Aid (FAFSA), what was your (and spouse's), or your parent's total balance of cash, savings, and checking accounts.

Student & Spouse
(if married)

Parents

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As of the day you filed your 2008-2009 Free Application for Federal Student Aid (FAFSA), what was the net worth of your (and spouse's), or your parent's investments? Net worth means current value minus debt. If net worth is one million dollars or more, enter \$999,999. If net worth is negative, enter 0. **Investments include** real estate (do not include the home you live in), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, 529 college savings plans, the refund value of 529 state prepaid tuition plans, installment and land sale contracts (including mortgages held), commodities, etc. For more information about reporting education savings plans, call 1-800-433-3243. Investment value means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments. **Investments do not include** the home you live in, the value of life insurance, retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc.), or cash, savings, and checking accounts already reported on the FAFSA.

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As of the day you filed your 2008-2009 Free Application for Federal Student Aid (FAFSA), what was the net worth of your (and spouse's), or your parent's businesses and/or investment farms? **Business and/or investment farm value includes** the market value of land, buildings, machinery, equipment, inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral. **Do not include** the value of a family farm that you (your spouse, and/or your parents) live on and operate. **Do not include** the value of a small business that you (your spouse and/or your parents) own and control and that has 100 or fewer full-time or full-time equivalent employees.

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SECTION 2: CERTIFICATION (Provide all required signatures and PUID below.)

Individuals indicated below by a checkmark must sign and date this Asset Information Worksheet, certifying that all information reported to qualify for Federal Student Aid is complete and correct.

Student Signature: _____

Date: _____

PUID: _____

Parent Signature: _____

Date: _____

Office Use Only: RRAAREQ_Assets (N) (S:\ES_FinAid\0809\Forms /Asset Info 0809) Rev 2/08 jh