

## Asset Information Worksheet

20\_\_\_\_ to 20\_\_\_\_ Academic Year

**Student Name** \_\_\_\_\_ **Student ID** \_\_\_\_\_

In order to process your application for Federal Financial Aid, additional clarification of your or your parent(s) assets is necessary.  
**Do not leave any fields blank; be sure to indicate a zero when appropriate.**

*Please complete the form below using information that was correct as of the date you completed your FAFSA.*

### Student/Spouse Assets

Total of cash, savings and checking accounts (do not include funds from student financial aid): \$ \_\_\_\_\_  
 Real estate and investment value (do not include the value of your principle home): \$ \_\_\_\_\_  
 Real estate and investment debt (do not include debt secured by your principle home): \$ \_\_\_\_\_  
 Business value (only include business value if you employ over 100 people): \$ \_\_\_\_\_  
 Business debt (only include business debt if you employ over 100 people): \$ \_\_\_\_\_  
 Investment farm value (do not include value of a family farm you live on and operate): \$ \_\_\_\_\_  
 Investment farm debt (do not include debt secured by a family farm you live on and operate): \$ \_\_\_\_\_

***\*See notes below for additional definitions/information***

### Parent(s)/Step-parent Assets

Total of cash, savings and checking accounts (do not include funds from student financial aid): \$ \_\_\_\_\_  
 Real estate and investment value (do not include the value of your principle home): \$ \_\_\_\_\_  
 Real estate and investment debt (do not include debt secured by your principle home): \$ \_\_\_\_\_  
 Business value (only include business value if you employ over 100 people): \$ \_\_\_\_\_  
 Business debt (only include business debt if you employ over 100 people): \$ \_\_\_\_\_  
 Investment farm value (do not include value of a family farm you live on and operate): \$ \_\_\_\_\_  
 Investment farm debt (Do not include debt secured by a family farm you live on and operate): \$ \_\_\_\_\_

***\*See notes below for additional definitions/information***

**Student Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Parent Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

(Only necessary for Dependent Students)

#### Definitions/Additional Information

**Investments include** real estate (*do not include your principle home*), 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 educational savings plans call 1 800-4-FED-AID. **Value** is as of the date the FAFSA was filed. **Debt** is any debt secured by indicated 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 in questions 40 and 88.

**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 secured by the indicated business or investment farm.

**Do not include the value** of a business you or your parent owns if the business employs less than 100 full-time or full-time equivalent employees.