



2019-20 Asset/Investment Information

G

Student Name

Student ID

Your Free Application for Federal Student Aid (FAFSA) has been selected for review. Please provide the following information for both you and your spouse (if applicable). If you are a dependent student for FAFSA purposes, your parents' information is also required. **Do not leave any items blank. Enter "0" if not applicable.**

Student/Spouse Information

Cash, savings, and checking balance \$ _____

Net Worth of Investments /Assets \$ _____

Net Worth of Business/Farm \$ _____

Parent Information

Cash, savings, and checking balance \$ _____

Net Worth of Investments /Assets \$ _____

Net Worth of Business/Farm \$ _____

Student Signature

Date

Parent Signature

Date

Net worth means the current value, as of today, of investments, businesses, and/or investment farms, minus related debts. When calculating net worth, use 0 for investments or properties with a negative value.

Investments include real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc.

Investments also include qualified educational benefits or education savings accounts (e.g., Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans). For a student who does not report parental information, the accounts owned by the student (and/or the student's spouse) are reported as student investments. For a student who must report parental information, the accounts are reported as parental investments, including all accounts owned by the student and all accounts owned by the parents for any member of the household.

Investments do not include the home you live in, the value of life insurance, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.)

Investments also do not include UGMA and UTMA accounts for which you are the custodian, but not the owner. Investment value means the current balance or market value of these investments as of today.

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.

Business value does not include the value of a small business if your family owns and controls more than 50 percent of the business and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, your family includes (1) persons directly related to you, such as a parent, sister or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law.

Investment farm value does not include the value of a family farm that you (your spouse and/or your parents) live on and operate.