



**FINANCIAL AID OFFICE
ASSET INFORMATION WORKSHEET
2009-2010**

STUDENT, SPOUSE AND PARENT ASSET INFORMATION:

You must give information about you and your spouse or parents' assets. If you are giving information for only one parent and that parent has jointly owned assets, give only that parent's portion of the assets and debts. Be sure to give information about assets held in trust for you, your spouse and/or your parents. If you, your spouse and your parents have assets owned jointly with someone else - such as a business or farm - give only the portion of the assets and debts held by you, your spouse and your parents.

DO NOT INCLUDE:

- a home, if it is a principal place of residence
- a family farm
- personal or consumer loans, or any debts that are not related to the assets listed
- the value of life insurance policies and retirement plans (pension funds, annuities, IRAs, KEOGH Plans), the value of a small business (100 or less fulltime employees)

MORE HELP: Listed below are some definitions to help you complete the grid on the reverse side.

Cash, Savings, and Checking Accounts

- Include the balance of checking and/or savings accounts as of TODAY.

Net Worth of Investments (including real estate)

- If you, your spouse or your parents own other real estate or have investments, write how much they are worth TODAY minus what you owe.
- Real estate includes rental property, land and second or summer homes. Include the value of portions of multifamily dwellings that are not the family's principal residence.
- Investments include trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds and 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) and commodities.

Net Worth of Businesses and/or Investment Farms

- If you, your spouse and/or your parents own a business with more than 100 fulltime employees, write in how much the business is worth TODAY minus what you owe. Include the market value of land, buildings, machinery, equipment, inventories.
- If you, your spouse and/or your parents own an investment farm, write in the value TODAY minus what you owe. Include the market value of land, buildings, machinery, equipment, livestock, inventories, etc. DO NOT INCLUDE a family farm.

ASSET INFORMATION:

Student's Name: _____ **Student's ID #:** _____

Student/Spouse

Parent(s)
(Dependent Students Only)

\$ _____ **Cash, Savings and Checking Accounts** \$ _____

\$ _____ **Net Worth of Investments** \$ _____
(including real estate)
(Do not include the home)

\$ _____ **Net Worth of Business and/or Investment Farm** \$ _____
(Do not include a family farm)

Student's Signature

Date

Parent's Signature
(Dependent Students Only)

Date