

## 2009—2010 ASSET INFORMATION WORKSHEET

**INSTRUCTIONS:** Complete this form and return it to our office. If you were required to provide your parents' income information on the FAFSA, you must also complete the parent section below.

Student and/or Spouse	Parent(s)	
\$ _____	\$ _____	At the time you completed the FAFSA, what was the net worth of <b>investments</b> , including real estate?
\$ _____	\$ _____	At the time you completed the FAFSA, what was the net worth of <b>current businesses and/or investment</b> ?
\$ _____	\$ _____	At the time you completed the FAFSA, what was the total current balance of <b>cash, savings and checking accounts</b> ? Do not include student financial aid.

- **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 zero.
- **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, installment and land sale contracts (including mortgages held), commodities, etc. Investments also include qualified educational benefits or education savings accounts such as 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 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.) or cash, savings and checking accounts. **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.
- **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.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Student's Name Printed

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student's Social Security Number