

## 2008-2009 ASSET INFORMATION WORKSHEET

**INSTRUCTIONS:** Complete all blanks in this section, even if the answer is zero.

If you were required to provide your parents' income information on the FAFSA, you must also complete the parent section below.

| <b>Student and/or Spouse</b> | <b>Parents</b> |  |
|------------------------------|----------------|--|
| \$ _____                     | \$ _____       | At the time you completed the FAFSA, what was the net worth of your (and your spouse's) current <b>investments</b> ? (See description below.)  |
| \$ _____                     | \$ _____       | At the time you completed the FAFSA, what was the net worth of your (and your spouse's) current <b>business and/or investment farms</b> ? Do not include a farm that you live on and operate. (See description below.) |
| \$ _____                     | \$ _____       | At the time you completed the FAFSA, what was your (and your spouse's) total current balance of <b>cash, savings, and checking accounts</b> ? Do not include student financial aid.                                    |

**NOTE:** When determining the information below, 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.

**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.

**Investment value** means the current balance or market value of your investments.

**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. NOTE: Students who are reporting parental information on this form must include education accounts owned by your parents including Coverdell savings accounts, 529 college savings plans, and the refund value of 529 state prepaid tuition plans.

**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 this form.

**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, and inventory, etc.

**Business and/or investment farm debt** means only those debts for which the business or investment farm was used as collateral.

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

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

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

\_\_\_\_\_  
Parent's Name Printed

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

\_\_\_\_\_  
Date