



# 2018-2019 Asset Form

In order to complete your financial aid application, please provide the following information about household assets. Be sure to include the appropriate signature(s) and date. Your file is considered "incomplete" until we have received and reviewed this information.

Student Name: \_\_\_\_\_  
Email: \_\_\_\_\_

Banner ID: \_\_\_\_\_  
Telephone: \_\_\_\_\_

**Fill in your student asset information and parent assets, if dependent, with numbers, values, and balances as of today's date. Enter zeros if applicable.**

**STUDENT ASSETS:**

What is your (and spouse's) total current balance of cash, savings, and checking accounts? <b>Do not</b> include student financial aid.	\$
What is the net worth of your (and spouse's) investments, including real estate? <b>Do not</b> include the home you in which you live.	\$
What is the net worth of your (and spouse's) current businesses and/or investment farms? <b>Do not</b> include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.	\$

**PARENT(S) ASSETS - FOR DEPENDENT STUDENTS ONLY:**

What is your parents' total current balance of cash, savings, and checking accounts?	\$
What is the net worth of your parents' investments, including real estate? <b>Do not</b> include the home in which your parents live.	\$
What is the net worth of your parents' current businesses and/or investment farms? <b>Do not</b> include a family farm or family business with 100 or fewer full-time or full-time-equivalent employees.	\$

**Net worth** means current value minus debt. If net worth is negative, enter zero.

**Investments include** real estate, 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. 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).

**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 already reported in the first question. Investments also do not include UGMA and UTMA accounts for which you are the custodian, but not the owner.

Student Signature: \_\_\_\_\_  
Parent Signature: \_\_\_\_\_

Date: \_\_\_\_\_  
Date: \_\_\_\_\_