



## Asset Statement 2024-2025

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

\_\_\_\_\_  
SIS ID

While reviewing your application for need-based financial aid, we determined that we need additional information regarding your family's assets. Please complete the form below and return to our office as soon as possible. We will not be able to continue our review of your file until this information is received and reviewed. Instructions for completing this form can be found on the reverse side. If you need additional assistance please contact our office and we will be happy to help you.

**NOTE:** Answers must reflect values as of the day you completed the Free Application for Federal Student Aid (FAFSA).

	Student (& Spouse) Assets
A) Cash, savings & checking accounts	\$
B) Value of all investments. Do not include real estate.	\$
C) Investment debt. Do not include real estate.	\$
D) Prepaid tuition plans (529/Coverdell)	\$
E) Business value	\$
F) Business debt Number of employees	\$
G) Investment farm value. Do not include a family farm.	\$
H) Investment farm debt. Do not include a family farm.	\$
I) Primary residence value	\$
J) Primary residence debt	\$

Other real estate: Please complete the following chart if you own real estate other than your home. Attach an additional sheet if you own more than five properties.

	Property #1	Property #2	Property #3	Property #4	Property #5
Address					
City & State					
Current Market Value					
Current Debt					
Purchase Year					
Purchase Price					

You may provide additional information in the comments section. If more space is needed, provide a separate page with the student's name and ID. By signing this worksheet, we certify that all information reported is complete and correct. At least one parent must sign this form. Failure to complete this form in its entirety may cause processing delays.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



**Comments:**

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**Student (& Spouse) Asset Information Instructions**

Please list all assets that belong to you, the student. If you (the student) are married, then you must report all assets that are listed in either of your names. **Note: values are the market value as of the day you filed your original FAFSA.**

**Cash, savings & checking accounts:** Include the current balance of your parent(s) cash, savings & checking account(s).

**Investment values include:** 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.

**Prepaid tuition plans (529/Coverdell):** For a student who does not report parental information, the accounts owned by the student (and/or student's spouse) are reported as student investments.

**Investments DO NOT include:** the home you live in, the value of life insurance, retirement plans (401(K) plan, pension funds, annuities, non-education IRAS, Keogh plans, etc.) or cash, savings and checking accounts reported separately. Investments also do not include UGMA and UTMA accounts for which you are the custodian, but not the owner.

**Other real estate & investment debt includes:** only those debts that are related to the listed investments.

**Business value includes:** market value of land, buildings, machinery, equipment, inventory, etc.

**Business debt includes:** the debts for which the business was used as collateral.

**Investment farm value includes:** market value of land, buildings, machinery, equipment, inventory, etc.

**Investment farm debt includes:** only the debts for which the investment farm was used as collateral.

**Primary residence value includes:** market value of your primary residence.

**Primary residence debt includes:** only the debts against your primary residence.