



## 2016-2017 ASSET INFORMATION FORM

Additional information is needed before our office can continue processing your application for federal student aid.  
**Refer to the back of this form for additional instructions.**

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

\_\_\_\_\_  
VIP ID

### INSTRUCTIONS:

- Answer **ALL** questions below.
- Enter zeros if appropriate; do not leave any questions blank.
- Provide appropriate signature(s), and return this form to the Financial Aid Office.
- Dependent and Independent students should place asset information in the appropriate column.
- You must report the answers as of the date you first completed your FAFSA.

|                                                                                                                                      | <u>Dependent Student</u> |          | <u>Independent Student</u> |
|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------|----------|----------------------------|
|                                                                                                                                      | Parent(s)                | Student  | Student<br>(& Spouse)      |
| 1. Cash, savings, and checking accounts:                                                                                             | \$ _____                 | \$ _____ | \$ _____                   |
| 2. Net worth of current investments:<br>(Don't include your home.)                                                                   | \$ _____                 | \$ _____ | \$ _____                   |
| 3. Net worth of current business and/or<br>Investments farms (Don't include a farm<br>that you or your parents live on and operate.) | \$ _____                 | \$ _____ | \$ _____                   |

By signing this document, I certify that all the information reported on it is complete and correct. If I purposely give false or misleading information on this document, it will be cause for denial or repayment of financial aid and I may also be fined, sentenced to jail, or both.

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent/Stepparent's Signature

\_\_\_\_\_  
Date

## **INSTRUCTIONS**

**Cash, savings, and checking accounts-** Write in the amount of money you have in cash, saving accounts, and checking accounts today. Do not include student financial aid.

**Investments include** real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), 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 (e.g., 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/or the student's spouse) are reported as student investments in question 42. For a student who must report parental information, the accounts are reported as parental investments in question 91, 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 already reported in questions 41 and 90.

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

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.