Student (and Spouse) Asset Information

Please see information below for further definition.

As of the date your 2014-2015 FAFSA was completed: _______________________________________

Total balance of cash, savings and checking accounts: $ __________________
Do NOT include student financial aid

Net worth of student (and spouse's) investments, including real estate: $ __________________
Do NOT include the home you live in

Net worth of student (and spouse's) current business and/or investment farms: $ __________________
Do NOT 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 0.
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 (e.g., Coverdell savings accounts,
529 college savings plans and the refund value of 529 prepaid tuition plans). The accounts owned by the student (and/or
the student’s spouse) are reported as student investments in question 41 on the FAFSA.
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
question 40 on the FAFSA. 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 the day the FAFSA was originally
completed. 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 or your spouse live on and operate.

Print Your Name: ___________________________________________ ID Number: __________________

Student Signature: ___________________________________________ Date: ______________________