



2017 – 2018 ASSET WORKSHEET

We've reviewed your 2017-2018 Free Application for Federal Student Aid (FAFSA) and have discovered that you did not answer the asset questions of the FAFSA at the time you submitted it. In order to continue processing your financial aid, please provide the following information.

NOTICE ABOUT OBTAINING INFORMATION

Authority to request and review information for Federal Student Aid is provided under the financial program rules (34 CFR, Part 668).

A. Student Information

Check One: New/Returning New Student Continuing Student

_____ XXX - XX - HU _____
 Last Name First Name M.I. Social Security Number SID#

B. Asset



	Student/Spouse	Parent(s)
1) CURRENCY - As of the day you filed your 2017-18 FAFSA, what is your (and spouse's) and parents' (if dependent) total current balance of cash, savings and checking accounts? Don't include student financial aid.	\$ _____	\$ _____

2) INVESTMENTS - As of the day you filed your 2017-18 FAFSA, what is your (and spouse's) and parents' (if dependent) investments, including real estate? Don't include the home you live in. *Net worth means current market value minus debt. If net worth is negative, enter 0.	Current Market Value:	Current Market Value:
	\$ _____	\$ _____
	Debt:	Debt:
See notes on back of this form for reporting investments.	\$ _____	\$ _____
	*Net Worth:	*Net Worth:
	\$ _____	\$ _____

3) BUSINESS - As of the day you filed your 2017-18 FAFSA, what is the net worth of what is your (and spouse's) and parents' (if dependent) current businesses and/or investment farms? Don't include a family farm or family business with 100 or fewer full-time or full-time equivalent employees. *Net worth means current market value minus debt. If net worth is negative, enter 0.	Current Market Value:	Current Market Value:
	\$ _____	\$ _____
	Debt:	Debt:
See notes on back of this form for reporting business.	\$ _____	\$ _____
	*Net Worth:	*Net Worth:
	\$ _____	\$ _____

C. Certification and Signature(s)

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.


 Student Signature _____ Date _____

 Parent Signature _____ Date _____

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sent to prison, or both.

Notes for Reporting Investments

Net worth means the current value, as of today, of investments, businesses, and/or investment farms, minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use 0 for investments or properties with a negative value.

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.

Money received, or paid on your behalf, also includes distributions to you (the student beneficiary) from a 529 plan that is owned by someone other than you or your parents (such as your grandparents, aunts, uncles, and non-custodial parents). You must include these distribution amounts in question 45j.

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.

Notes for Reporting Business

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.