

## - INDEPENDENT STUDENT - Asset Information

STUDENT ID	LAST NAME	FIRST NAME	PHONE NUMBER (with area code)
PLEASE PRINT IN BLACK INK			

	STUDENT	SPOUSE
<b>Total balance of cash, savings, and checking accounts on the day FAFSA filed</b>	\$	\$

**Net worth of investments on the day the FAFSA was filed**

Do you own real estate other than the home you live in?  No  Yes:  
If yes, what is the total current net worth of the property or properties?

Market Value – Mortgage/Debt = Net Worth

	STUDENT	SPOUSE
market value	\$	\$
- mortgage/debt	\$	\$
<b>Net Worth</b>	<b>\$</b>	<b>\$</b>

Do you own a partnership or corporation?  No  Yes: If yes, what is the total current net worth of your share(s) of partnership(s) and/or corporation(s)?

Market Value – Mortgage/Debt = Net Worth

	STUDENT	SPOUSE
market value	\$	\$
- mortgage/debt	\$	\$
<b>Net Worth</b>	<b>\$</b>	<b>\$</b>

Do you own a 529 college savings plan?  No  Yes: What is the value of the 529 plan?

\$	\$
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Do you own other investments such as trust funds, money market or mutual funds, certificates of deposit, stocks, bonds, etc?  No  Yes: What is the value of these investments?

\$	\$
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**Investments do not include** the value of life insurance, retirement plans (*401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.*), or cash, savings, checking accounts already reported above. Investments also do not include UGMA and UTMA accounts for which you are the custodian, but not the owner.

**Net worth of business and/or investment farm on the day the FAFSA was filed**

**NOTE:** Business and/or investment farm value includes the market value of land, buildings, machinery, equipment, and inventory, etc.  
Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral

Do you own a business?  No  Yes: What is the current net worth of it?  
If Yes: Are you self-employed with no employees?  Yes

(market value – debt)

No: How many employees does your business have? \_\_\_\_\_

Is the business reported on taxes as a partnership or corporation?  No  Yes: What is the current net worth?

	STUDENT	SPOUSE
\$	\$	\$

Do you own a farm?  No  Yes: What is the current net worth of it?  
If Yes: Does your family live on AND operate the farm?  No  Yes

(market value – debt)

Is the farm reported on taxes as a partnership or corporation?  No  Yes

	STUDENT	SPOUSE
\$	\$	\$

Comments:

**CERTIFICATION & SIGNATURE(S)**

**By signing this worksheet, I (we) certify that all the information reported on it is complete and correct.**

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature- (if married)

**WARNING:**  
If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.