

Asset Information Worksheet 2009-2010

Last _____ First _____ M.I. _____ Social Security Number or ID _____
 Address _____ Phone Number _____

Please provide the following information for you and your spouse (or parents if applicable) as of the date your FAFSA was completed. Enter "0" when appropriate. Do not leave any item blank. **Read reverse side for additional information.**

Student Asset Information

Asset	Value	Debt
Cash	\$	
Checking Account	\$	
Savings Account	\$	
Investments	\$	\$
Business	\$	\$
Investment Farm	\$	\$

Parent Asset Information

Asset	Value	Debt
Cash	\$	
Checking Account	\$	
Savings Account	\$	
Investments	\$	\$
Business	\$	\$
Investment Farm	\$	\$

Student Signature _____ Date _____

Parent Signature _____ Date _____

- **Investments include** real estate (do not include the home you live in), trust funds, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, college savings plans, installment and land sale contracts (including mortgages held), commodities, etc.
- **Investments do not include** the home you live in, the value of life insurance, retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc.) prepaid tuition plans, cash, savings, and checking accounts.
- **Investment value** means the market value of these investments as of the date the FAFSA was signed.
- **Investment debt** means only those debts that are related to the investments.
- **Business and/or investment farm value** includes the market value of land, building, machinery, equipment, inventory, etc.
- **Business and/or investment farm debt** means the amount of debt you have associated with the business and/or farm. In calculating the amount of debt owing, include only the principal amount of the loan; do not include the interest that will accrue over the term of the loan.
- **Do not include** a farm that you live on and operate.

03/09