

Student Name _____

ID _____

The FAFSA processing center is now requiring this information. Please complete the form below so we can complete your verification process.

Information to answer questions below:

- Investments include real estate (do not include the family home), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, 529 college savings plans, the refund value of 529 prepaid tuition plans, installment and land sale contracts (including mortgages held), commodities, etc. For more information about reporting educational savings plans call 1-800-4-FED-AID. 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.
- Do not include the value of life insurance, retirement plans (pension funds, annuities, non education IRAs, Keogh plans, etc.) or cash, savings, and checking accounts already reported in Q41 and Q89.
- 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 or your parents) live on and operate.

Student Asset Information (for independent & dependent students)

As of today, what is your (and your spouse's) total current balance of cash, savings, and checking accounts? (Q41) \$ _____

As of today, what is the net worth of your (and your spouse's) investments, including real estate (not your home)? (Q42) \$ _____
 Net worth means current value minus debt.

As of today, what is the net worth of your (and your spouse's) current businesses and/or investment farms? (Q43) \$ _____
 Do not include the value of a family farm that you (your spouse and/or your parents) live on and operate. Do not include the value of a small business that you (your spouse and/or your parents) own and control and that has 100 or fewer full-time or full-time equivalent employees

Parent Asset Information (for parents of dependent students)

As of today, what is your parents' total current balance in cash, savings, and checking accounts? (Q89) \$ _____

As of today, what is the net worth of your parents' investments, including real estate (not their home)? (Q90) Net worth means current value minus debt. \$ _____

As of today, what is the net worth of your parents' current business and/or investment farms? (Q91) Do not include the value of a family farm that you (your spouse and/or your parents) live on and operate. Do not include the value of a small business that you (your spouse and/or your parents) own and control and that has 100 or fewer full-time or full-time equivalent employees. \$ _____

Student signature _____ Date _____

Parent signature _____ Date _____
 (for dependent student)