

Student Name _____ ID _____

Department of Education 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, installment and land sale contracts (including mortgages held), commodities, etc. (e.g. Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans).

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 the home you live in, the value of life insurance, retirement plans (401k plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings, and checking accounts already reported in questions 40 and 88.

• 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.

Student Asset Information

As of today, what is your (and your spouse's) total current balance of cash, savings and checking accounts? (Q40) \$ _____

As of today, what is the net worth of your (and your spouse's) investments, including real estate (not your home you live in)? (Q41) \$ _____

Net worth means current value minus debt.

As of today, what is the net worth of your (and spouse's) current businesses and/or investment farms? (Q42) \$ _____

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

As of today, what is your parents' total current balance of cash, savings, and checking accounts? (Q88) \$ _____

As of today, what is the net worth of your parents' investments, including real estate (not their home)? (Q89) Net worth means current value minus debt. \$ _____

As of today, what is the net worth of your parents' current businesses and/or investment farms? (Q90) **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. \$ _____

Signature _____ Date _____

Return to Financial Aid Office, Vincennes University, 1002 North First St. , Vincennes, Indiana, 47591 or Fax to 812-888-4261.