

Student Name (please print): \_\_\_\_\_ Student Number: W\_\_\_\_\_

In order for you to receive financial aid, you must submit additional information regarding your and your spouse's assets. Please complete this form, using your and your spouse's combined asset information (if applicable).

**INSTRUCTIONS:**

If you have jointly owned assets with someone else (such as a business or farm), give only your portion of the assets and debts. If you are divorced or separated and you and your spouse have jointly owned assets, give only your portion of the assets and debts. Be sure to give information about assets held in trust for you (and your spouse).

1. **Cash, Savings and checking accounts:** Include the balance of checking or savings accounts as of the date of your initial FAFSA application, unless you do not have access to the money because the state declared a bank emergency due to the insolvency of a private deposit insurance fund.
2. **Other real estate and investments value:** If you have investments or own other real estate including rental property, land, second or summer homes and multi-family dwellings (except the part the family occupies), write in how much they are worth as of the date of the initial FAFSA submission. Investments include trust funds, money market funds, mutual funds, certificates of deposits, stocks, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, precious and strategic metals, etc. Do not include your home.
3. **Other real estate and investments debt:** Write in how much you owe on other real estate and investments.
4. **Business value:** If you own a business, write in how much the business is worth today. Include the value of land, buildings, machinery, equipment, inventories, etc.
5. **Business debt:** Write in what you owe on your business. Include only the present mortgage and related debts for which the business has been used as collateral.
6. **Farm Value:** If you own an investment farm, write in the value of the farm today. Include the value of the land, buildings, machinery, equipment, livestock, inventories, etc. Do not include a family farm if it is your principal place of residence.
7. **Farm Debt:** Write in what you owe on the investment farm. Include only the present mortgage and related debts for which the farm was used as collateral.

## DO NOT include:

- A home, if it is the principal place of residence
- A family farm, if it is the principal place of residence and you claimed on Schedule F of their most recent tax return that they "materially participated in the farm's operation"
- Personal or consumer loans, or any debts that are not related to the assets listed
- The value of retirement plans (pension funds, annuities, IRAs, Keogh Plans, etc.)
- Student financial aid

**Please complete the following:**

- |  |          |
|--|----------|
| 1. Cash, saving, and checking accounts:    | \$ _____ |
| 2. Other real estate and investments value | \$ _____ |
| 3. Other real estate investments debt      | \$ _____ |
| 4. Business value                          | \$ _____ |
| 5. Business debt                           | \$ _____ |
| Number of employees                        | _____    |
| 6. Farm value                              | \$ _____ |
| 7. Farm debt                               | \$ _____ |

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

 \_\_\_\_\_  
**Date**