

**2009-2010 ASSET INFORMATION NEEDED**

Student Name—Last, First Middle Initial \_\_\_\_\_

Student ID Number \_\_\_\_\_

Social Security Number \_\_\_\_\_

Please provide the following information that was left blank on your application for financial aid (FAFSA) so we can complete the evaluation of your file. **Report information (current values) as of the date of the FAFSA application. If any item does not apply, enter a zero "0". Do not leave any lines blank.**

**Net worth:** means current value minus debt.

**Investments:** include real estate (other than your home), trust funds, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, education IRA's, college savings plans, installment and land sale contracts (including mortgages held), commodities, etc.

**Investment value:** includes the market value of these investments. Do not include the home you live in, cash, savings, checking accounts, the value of life insurance and retirement plans (pension funds, annuities, noneducational IRAs, Keogh plans, etc.) or the value of prepaid tuition plans.

**Investment debt:** means only those debts that are related to the investments.

**Business/investment farm value:** includes the market value of land, buildings, machinery, equipment and inventory, etc.

**Business/investment farm debt:** means only those debts for which the business was used as collateral.

**Veteran Type:** 1) Montgomery GI Bill (Chapter 30); 2) Post-9/11 GI Bill (Chapter 33); 3) Montgomery GI Bill (Chapter 30); 4) Reserve Educational Assistance Program (Chapter 1607); 5) Vocational Rehabilitation & Employment (Chapter 31); 6) Dependents' Educational Assistance (Chapter 35); 7) any other type of veterans education benefits.

**Student Section Step 2:**

41. What is your (and spouse's) total current balance of **cash, savings and checking accounts**?  
Do not include student financial aid. \$ \_\_\_\_\_

42. What is the net worth of your (and spouse's) current **investments**? \$ \_\_\_\_\_

43. What is the net worth of your (and spouse's) current **businesses and/or investment farms**? Do not include a farm that you live on and operate. \$ \_\_\_\_\_

44-45. Will you receive veterans education benefits, between July 1, 2009 and June 30, 2010?  
What type of veterans educational benefits will you receive? Do not include your spouse's veterans education benefits.  
Yes/No (#44) \_\_\_\_\_

Type—list Chapter number from above listing (#45) \_\_\_\_\_

**Parent Section Step 4** (Complete if you were required to report your parents' information on your application):

91. What is your parents' total current balance of **cash, savings, and checking accounts**? \$ \_\_\_\_\_

92. What is the net worth of your parents' current **investments**? \$ \_\_\_\_\_

93. What is the net worth of your parents' current **businesses and/or investment farms**?  
Do not include a farm that your parents live on and operate. \$ \_\_\_\_\_

**CERTIFICATION:** All of the information on this form is true and complete to the best of my knowledge. I understand that if I purposely give false or misleading information on this form, I may be subject to a \$20,000 fine, a prison sentence, or both.

Student \_\_\_\_\_ Date \_\_\_\_\_

Student's Spouse \_\_\_\_\_ Date \_\_\_\_\_

Father/Stepfather \_\_\_\_\_ Date \_\_\_\_\_

Mother/Stepmother \_\_\_\_\_ Date \_\_\_\_\_