

STATEMENT OF ASSETS/INVESTMENTS 2008-2009 AWARD YEAR

We need clarification regarding the assets as reported on your FAFSA. Please check your records carefully.

Report the value of your assets as of the date you signed your FAFSA.

Student Name _____ **Stu. ID** _____
Please Print

STUDENT (and spouse)		PARENT(S)		
	Value of Asset	Debt Remaining	Value of Asset	Debt Remaining
1. Cash, savings, and checking accounts.	\$ _____	\$ _____	\$ _____	\$ _____
2. Real estate and other investments. (see below)	\$ _____	\$ _____	\$ _____	\$ _____
3. Business/Farm (see below)	\$ _____	\$ _____	\$ _____	\$ _____
4. If business, name & type of business:				
5. If business is family owned and operated, give total number of FT/FTE employees:				

- Investments include real estate (other than the home you live in), trust funds, money market funds, mutual funds, CDs, stocks, stock options, bonds, other securities, Coverdell savings accounts, college savings plans, prepaid tuition plans (if owned by the independent student, or the parent of the dependent student, regardless of the beneficiary), installment and land sale contracts (including mortgages held), commodities, etc. Investment value includes the market value of these investments as of today. Investment debt means only those debts that are related to the investments.
- Investments do NOT include the home you live in, the value of life insurance, retirement plans (pension funds, annuities, noneducation IRAs, Keogh plans, etc.).
- Business and/or investment farm value includes the market value of land, buildings, vehicles, machinery, equipment, inventory, etc. Business and/or farm debt means only those debts for which the business assets or investment farm was used as collateral.

Student Signature	Date
Parent Signature	Date