

**2009-2010 STUDENT ASSET INFORMATION FORM**

Student's Name \_\_\_\_\_ Student ID/SSN \_\_\_\_\_  
 Phone No. \_\_\_\_\_ E-mail address \_\_\_\_\_

Your 2008 income tax return includes income from assets. However, your assets as indicated on the 2009-2010 Free Application for Federal Student Aid (FAFSA) appear to be understated relative to this income. Please complete this form and return it to the Financial Aid Services Office as soon as possible.

**WHAT DO I INCLUDE?**

Please include asset values as of the date the FAFSA was signed. Investments include: real estate (this does not include your primary residence, however if you reside in a multi-family home, you must report the value of the rental portion of the residence), 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. 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 investment. Investments do not include the home you live in, 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 on the FAFSA (question 41).

**WHAT IF I DON'T HAVE A PARTICULAR ASSET ANYMORE?**

If you had assets during 2008 that are no longer available, then you must enclose a brief signed and dated statement with this form explaining the reason for the decrease and submit a copy of the statement showing when the account was either decreased or closed. Failure to explain reduced assets and provide supporting documentation will delay your financial aid award decision, as your file will still be considered incomplete.

Please complete A through E. **Do not leave any item blank**, use zeros if necessary.

**CHECKING/SAVINGS ACCOUNTS**

	Institution(s)	Amount
A. Checking account(s) balance(s):	_____	\$ _____
B. Savings account(s) balance(s):	_____	\$ _____

**OTHER REAL ESTATE AND INVESTMENTS**

	Type of Asset	Market Value	Debt
C.	_____	\$ _____	\$ _____
D.	_____	\$ _____	\$ _____
E.	_____	\$ _____	\$ _____

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