



## Student Financial Services 2020-2021 Statement of Assets/Investments

**Name** \_\_\_\_\_

**Student ID #** \_\_\_\_\_

Please complete each section in black ink, giving a dollar amount, \$0, or N/A if not applicable **as of the date you completed the FAFSA.**

**ASSETS (at the time the FAFSA was completed):**

	Student/Spouse	Parent(s)
Amount of Cash	\$ _____	\$ _____
Amount in Savings	\$ _____	\$ _____
Amount in Checking Account(s)	\$ _____	\$ _____

**INVESTMENTS:**

Investments include Money Market Funds, Certificates of Deposit, real estate (other than the home you live in), rental property (including a unit in your home if it has its own entrance, kitchen, and bath and is rented to a non-family member), trust funds, mutual funds, stocks, stock options, bonds, other securities, UGMA and UTMA accounts, Coverdell Savings Accounts, college savings plans, installment and land sale contracts (including mortgages held) and/or commodities.

	Student/Spouse	Parent(s)
Total Investment Net Worth*:	\$ _____	\$ _____

**BUSINESS/INVESTMENT FARM:**

Is your business family-owned or a family-controlled small business? \_\_\_\_\_ YES \_\_\_\_\_ NO \_\_\_\_\_%

How many are employed? \_\_\_\_\_

	Student/Spouse	Parent(s)
What is the net worth* of the business?	\$ _____	\$ _____

	Student/Spouse	Parent(s)
What is the net worth* of the Investment Farm? (An Investment Farm would include any farmland not adjoining your primary residence.)	\$ _____	\$ _____

\*Net worth means current value minus debt. Negative amounts should be reported as \$0.

**Student's Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Parent's Signature** \_\_\_\_\_ **Date** \_\_\_\_\_ **(Required for dependent students)**