



Office of Student Financial Services

2020-2021 ASSET WORKSHEET

STUDENT NAME: _____ ID#: _____
(Last) (First) (MI)

We have reviewed your 2020-2021 FAFSA (Free Application for Federal Student Aid) and need further clarification on the reported asset information. We are unable to continue processing your aid application until we receive this worksheet back from you. Asset values must be reported as of the date the FAFSA initially was filed. Please return this form and any supporting documents within 10 days to one of the addresses/numbers below; if faxing, do not send again by mail.

Please Note: All fields must be completed. For zero dollar amounts, enter "0" in the field.

CASH, SAVINGS & CHECKING VALUE PARENT \$ _____ STUDENT \$ _____

REAL ESTATE VALUE (exclude primary residence) PARENT \$ _____ STUDENT \$ _____

REAL ESTATE DEBT (exclude primary residence) PARENT \$ _____ STUDENT \$ _____
Real estate includes land, rental property, and second homes that are not your primary residence. Only include rental portion of primary residence.

INVESTMENT VALUE PARENT \$ _____ STUDENT \$ _____

INVESTMENT DEBT PARENT \$ _____ STUDENT \$ _____
Investments include installment and land sale contracts, mortgages held from the sale of property, CDs, trust funds, money market funds, mutual funds, stocks, stock options, bonds, other securities, education IRA, Coverdell savings accounts, refund value of prepaid tuition, partnerships, S corporations, etc. Do NOT include value of life insurance, retirement plans (401k plan, pension plans, annuities, Keogh plans)

529 COLLEGE SAVINGS PLANS PARENT \$ _____ STUDENT \$ _____

*TOTAL BUSINESS VALUE (report each business separately) PARENT \$ _____ STUDENT \$ _____

*TOTAL BUSINESS DEBT (report each business separately) PARENT \$ _____ STUDENT \$ _____

Percentage of Ownership _____% Number of Full-Time Employees _____

*INVESTMENT FARM VALUE (exclude primary residence) PARENT \$ _____ STUDENT \$ _____

*INVESTMENT FARM DEBT (exclude primary residence) PARENT \$ _____ STUDENT \$ _____
Include livestock, machinery, land, buildings, equipment, etc.

*Family-owned and controlled small businesses (which can include farms) that have 100 or fewer full-time or full-time equivalent employees do not count as an asset. "Family-owned and controlled" means that more than 50% of the business is owned by persons who are directly related or are or were related by marriage (family members do not have to be counted in the household size for this question).

Certification By Parent and Student

I certify that all the information on this form is complete and correct.

Parent Signature: _____ Student Signature: _____

Date: _____ Date: _____