



Student Name: _____ Student ID: _____

We need additional information before we can determine your eligibility for financial aid. Please complete the items highlighted in the chart below with values as of _____. When completed, sign and date the statement and return it to our office.

Student Information

- 41. As of the date shown above, what is your (and your spouse's) total balance of cash, savings, and checking accounts? Do not include student financial aid. \$_____
42. As of the date shown above, what is the net worth of your (and your spouse's) investments, including real estate (not your home)? Net worth means current value minus debt. \$_____
43. As of the date shown above, what is the net worth of your (and your spouse's) business and/or investment farms? Do not include a farm that you live on and operate. \$_____

Net worth means current value minus debt. If net worth is one million or more, enter \$999,999. If net worth is negative, enter 0.

Investments include real estate (do not include the home you live in), trust funds, UGMA and UTMA accounts, money market funds mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, education IRAs, installment and land 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 also include qualified educational benefits or education savings accounts such as Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans. For a student who does not report parental information, the accounts owned by the student (and the student's spouse) are reported as the student investments in question 42. For a student who must report parental information, the accounts are reported as parental investments in question 91, including all accounts owned by the parents for any member of the household.

Investments do not include the home you live in, cash, savings, checking accounts, the value of life insurance and retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc.), or the value of prepaid tuition plans.

Business and/or investment farm value includes the market value of land, buildings, machinery, equipment, inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral.

I confirm that the information is accurate.

Date

Student

Date

Spouse