

2023-2024 Financial Aid Asset Information Request

Student Information:

			XXX-XX	W00
Last Name	First	M.I.	Last 4 Social Security No.	Student I.D.
Address	City	State	Zip code	Phone Number

Instructions:

Upon review of your verification documents, further clarification is needed for asset values either listed on your federal tax return or left blank on the FAFSA. Please complete **ALL** information below as it was on the date you filed the 2023-2024 FAFSA. If your 2021 federal tax return information reflects “taxable interest earned” you must report the value associated with the asset. **THERE MUST BE DOLLAR AMOUNTS LISTED. IF THIS FORM IS SUBMITTED WITHOUT DOLLAR AMOUNTS, IT WILL BE CONSIDERED INCOMPLTE AND RETURNED TO YOU, THE STUDENT.**

Please also **submit** any of the following schedules filed with your 2021 tax return for both student and parent:

Schedule: 1, 2, 3

Type of Asset	Student (and Spouse)	Parent (s)
<p>Cash & Savings Accounts:</p> <p style="text-align: center;">\$ _____</p>	\$ _____	\$ _____
<p>Net Worth (Value minus Debt) of Investments:</p> <p style="text-align: center;">\$ _____</p> <p><i>Investments include: trust funds, UGMA and UTMA accounts, money market funds, mutual funds, CD's, stocks, stock options, bonds, securities, commodities, qualified educational savings accounts, installment and land sales contracts. Do not include retirement accounts.</i></p>	\$ _____	\$ _____
<p>Business Net Worth:</p> <p><i>Total value includes market value of all assets such as land, buildings, equipment, inventories, etc.</i></p> <p><i>Total debt includes mortgage and related debts for assets used as collateral</i></p>	<p>Total Value: \$ _____</p> <p>Total Debt: \$ _____</p> <p>Check Which applies:</p> <p><input type="checkbox"/> 100 or fewer employees</p> <p><input type="checkbox"/> More than 100 employees</p>	<p>Total Value: \$ _____</p> <p>Total Debt: \$ _____</p> <p>Check Which applies:</p> <p><input type="checkbox"/> 100 or fewer employees</p> <p><input type="checkbox"/> More than 100 employees</p>
<p>Partnerships/S-Corporations:</p> <p><i>If a partnership/S-Corporation is owned by more than one person, only include the portion of the value/debt held by the student and/or parent(s).</i></p>	<p>Total Value: \$ _____</p> <p>Total Debt: \$ _____</p> <p>Do you live on the farm?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Total Value: \$ _____</p> <p>Total Debt: \$ _____</p> <p>Do you live on the farm?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Rental Real Estate Values:</p> <p><i>*Do not include the home in which you live.</i></p>	<p>Property Value: \$ _____</p> <p>Amt owed on property \$ _____</p>	<p>Property Value: \$ _____</p> <p>Amt owed on property \$ _____</p>

I/We certify that the above information is true and correct to the best of our knowledge.

Student's Signature

Date

Parent's Signature
(Dependent Students Only)

Date