

Student Name: _____

Student ID #: _____
(8 digits)



2023-24 ASSET WORKSHEET (Independent Student)

The information requested on this form is needed to process your application for financial aid for the 2023-24 academic year.

Please provide the exact dollar amount as of the date your FAFSA was filed. See notes to review what should be included and what may be excluded.

DO NOT LEAVE ANY BLANKS. Check NOT APPLICABLE (N/A) if \$0.

	Student Assets		Spouse Assets (if applicable)	
Total balance of cash, savings, and checking accounts	\$	<input type="checkbox"/> N/A	\$	<input type="checkbox"/> N/A
Net worth of investments including real estate (excluding the home you live in)	\$	<input type="checkbox"/> N/A	\$	<input type="checkbox"/> N/A
Net worth of current business and/or investment farm	\$	<input type="checkbox"/> N/A	\$	<input type="checkbox"/> N/A

NOTES:

- **Net worth** means the current value, as of the date the FAFSA was filed, minus debts related to those same investments. When calculating net worth, use \$0 for investments or properties with a negative value.
- **Investments include** real estate, except the home you live in, rental property, trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, qualified educational benefits or education savings plans, etc.
- **Investments do not include** the home you live in, the value of life insurance, retirement plans (401k plans, pension funds, annuities, non-education IRAs, Keogh plans, etc).
- **Business and/or investment farm does not include** the value of a small business if your family owns and controls more than 50% of the business and the business has 100 or fewer full-time or full-time equivalent employees.
- **Investment farm value does not include** the value of the family farm you (and/or your spouse) live on and operate.
- **Business and/or investment farm value** includes the market value of land, buildings, machinery, equipment, inventory, etc.
- **Business and/or investment farm debt** includes the debts for which the business or investment farm was used as collateral.

CERTIFICATION AND AUTHORIZATION

By signing, I certify that all of the information reported is complete and correct.

STUDENT SIGNATURE

DATE

SPOUSE SIGNATURE (IF APPLICABLE)

DATE

Please note electronic signatures will not be accepted and forms will be returned.