



OFFICE OF FINANCIAL AID

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Based on our review of your financial aid application, we need some additional details on your investments. Please complete the following questions below (leaving no blanks). The value of the asset reported is based on the date you filed the FAFSA. After completing the form, please return a signed copy of the document via fax or [secure upload](#).

**Student Name:** \_\_\_\_\_

**Banner ID:** \_\_\_\_\_

Investment Type	Amount of Investment
Cash, savings, and checking account balances	\$ _____
Trust Funds	\$ _____
Stocks, stock options, bonds, savings bonds, mutual funds, money market accounts, certificate of deposits, and other securities	\$ _____
<b>FAFSA Only</b> - Section 529 college savings or pre-paid tuition plans, or Coverdell Accounts (for dependent student applicant only)	\$ _____
<b>CSS Profile Only</b> - Section 529 college savings or pre-paid tuition plans, or Coverdell Accounts (for all other dependent children in the household)	\$ _____
Commodities, precious & strategic metals, installment & land sale contracts (including seller-financed mortgages)	\$ _____
Other Real Estate Value (Market Value – Debt, do not include your primary place of residence).	\$ _____
All other investments	Investment Type: _____ \$ _____
Value of your current business(es) and/or investment farms (Market Value – Debt)	\$ _____
Child Support Received (Child support received in prior completed calendar year)	

I certify that the information provided above is correct to the best of my knowledge.

\_\_\_\_\_  
Student Signature/Date

\_\_\_\_\_  
Parent Signature/Date

## Investment Instructions from the FAFSA

Net worth means the current value, as of today, of investments, businesses, and/or investment farms, minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use \$0 for investments or properties with a negative value.

**Investments include** real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), 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, etc.

**Investments also include** qualified education benefits or education savings accounts such as Coverdell savings accounts, 529 college savings plans, and the refund value of 529 prepaid tuition plans. If the student is required to report parent information on the FAFSA form, parents should not report the value of education savings accounts for other children. Qualified education benefits or education savings accounts must be reported as an asset of the parent if the student is required to report parent information. If the student is not required to report parent information on the FAFSA form, the education benefit or savings account is reported as an asset of the student. UGMA and UTMA accounts are considered the assets of the student and must be reported as an asset of the student on the FAFSA form, regardless of whether the student is required to report parent information.

**Investments do not include** the home you live in, the value of life insurance, ABLE accounts, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.), or cash, savings, and checking accounts reported in the previous question.

**Investments also do not include** UGMA/UTMA accounts for which the student is the custodian but not the owner or the value of qualified education benefits or education savings accounts that are for the benefit of the parent's other children (not the student).

**Investment value** means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments.

**Businesses and investment farms include** businesses that you own (including a small or family-run business) or income-producing farms that you own (including the fair market value of land, buildings, livestock, unharvested crops, and machinery actively used in investment farms, agricultural, or commercial activities).

**Businesses and investment farms do not include** the value of crops that are grown solely for consumption by the student and their family or the home in which you live. If the home in which you live is also located on a farm that you own, do not include the net value of that principal residence in the net value of all farm assets. The principal residence may include the home, structures, and land that are adjacent to the home that are not being used, stored, or sold for farming or other commercial activities.