Dickinson

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. Do not leave any of these questions blank. If a question doesn't apply, enter "0". **Use figures as of the day the original Free Application for Federal Student Aid (FAFSA) was completed**. Round figures to the nearest dollar. Do not include personal or consumer loans or any debts that are not related to the assets listed, the value of retirement plans (pension funds, annuities, IRAs, Keogh plans, etc.), or student financial aid. After completing the form, please return a signed copy of the document via secure upload.

Student Name: _____ **Banner ID:** _____

Asset Information		
	Parent Amount	**Student Amount**
Cash, savings and checking accounts. Enter the total balance of cash, savings, checking accounts		
Trust Funds		
Stocks, stock options, bonds, savings bonds, mutual funds, money market accounts, certificate of deposits, and other securities		
FAFSA Only - Section 529 college savings or pre-paid tuition plans, or Coverdell Accounts (for dependent student applicant only)		
CSS Profile Only- Section 529 college savings or pre-paid tuition plans, or Coverdell Accounts (for all other dependent children in the household)		
UGMA and UTMA accounts (considered the asset of the student)	N/A	
Commodities, precious & strategic metals, installment & land sale contracts (including seller-financed mortgages)		
Other real estate value. If you or your parents own other real estate (including rental property, land, second or summer homes), enter how much these assets are worth today.		

Other real estate debt. Amount owned on other real estate.		
Business value. If you and/or your parents own a **small or family-run business with more than 100 employees**, indicate how much the business is worth today and how many full-time or full-time equivalent employees, you employ. Include the market value of land, buildings, machinery, equipment, inventories, etc. Do not include the home even if it is part of the business		
Business debt. Amount owed against business value. Include only the present mortgage and related debts for which the business was used as collateral. If you are not the sole owner(s), include only your share of the total value and debt.		
Investment farm value. If you and/or your parents own a **farm with more than 100 employees**, indicate how much the farm is worth today. Include the market value of land, buildings, machinery, equipment, livestock, inventories, etc. Do not include the home even if it is part of the farm.		
Investment farm debt. Amount owed against farm value. Include only the present mortgage and related debts for which the farm was used as collateral. If you are not the sole owner(s), write in only your share of the value and debt.		
Child support received. Amount of child support received in 2024 (or 2025 if you submit the FAFSA after 12/31/2025).		

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 (including small or family-run businesses) owned by you that have more than 100 fulltime (or full-time equivalent) employees, along with the fair market value of real estate owned by the business. They also include income producing farms that you own, including the fair market value of land, buildings, livestock, unharvested crops, and machinery actively used in farming, agricultural, or commercial activities

Businesses and investment farms do not include businesses with 100 or fewer full-time (or full-time equivalent) employees; the value of a family farm on which the family resides; the value of crops that are grown solely for consumption by the student and their family; a commercial fishing business and related expenses, including fishing vessels and permits owned and controlled by the family; or the home in which you live.