

STATEMENT OF ASSETS/INVESTMENTS 2009-2010 AWARD YEAR

Please complete the following asset information as of the date the original Free Application for Federal Student Aid (FAFSA) was completed. *Dependent* students must complete the student & parent column. *Independent* students must complete the student (& spouse) column only. Write "0" if it does not apply to you.

Student Name _____ UIN _____

	Student (and Spouse)		Parent	
	Value of Asset	Debt Remaining	Value of Asset	Debt Remaining
Cash, savings, and checking accounts				
Real estate and other investments (see below)				
Business/Farm (see below)				
If business, name & type of business				
If business is family owned and operated, give total of FT/FTE employees				

- Investments include real estate (other than the home you live in), trust funds, money market funds, CDs, stocks, stock options, bonds, other securities, Coverdell Savings accounts, college savings plans, prepaid tuition plans (if owned by the independent student, or the parent of the dependent student, regardless of the beneficiary), installment and land sale 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 do NOT include the home you live in, the value of life insurance, retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc.).
- Business and/or investment farm value includes the market value of land, buildings, vehicles, machinery, equipment, inventory, etc. Business and/or farm debt means only those debts for which the business assets or investment farm was used as collateral.

Student Signature _____

Date _____

Parent Signature _____

Date _____