

Student's Name : \_\_\_\_\_ Student ID#: \_\_\_\_\_

The Asset information you provided on the FAFSA (Free Application for Federal Student Aid) was incomplete or needs to be clarified. Please complete and return this form to the Financial Aid Office. **Net Worth means current value minus debt. Do not leave any information blank. If the amount is 0, please put "0" for the dollar amount.**

If you have any questions, please call our office at (978) 665-3156. If you wish to fax us this information, our fax number is (978)665-3559.

**Student (and Spouse)**

Total current balance of cash, savings, and checking accounts \$ \_\_\_\_\_

Net Worth of Investments \$ \_\_\_\_\_

Investments include real estate (do not include the home you live in), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, \*529 college savings plans, the refund value of 529 state prepaid savings plans, installment and land sale contracts (including mortgages held), commodities, etc. 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. Investments do not include the home you live in, the value of life insurance, retirement plans (pension funds, annuities, noneducation IRAs, Keogh plans etc.) or cash, savings, and checking accounts already reported in questions 43 and 87 of the FAFSA. \*Please note if a 529 account is owned by a student who must report parental information, the value of the account is not to be reported.

Net Worth of Business \$ \_\_\_\_\_

Net worth of Business includes the market value of land, buildings, machinery, equipment, inventory, etc. Business debt means only those debts for which the business was used as collateral. Do not include the value of a small business that you (or your spouse) own and control and that has 100 or fewer full-time or full-time equivalent employees. Please provide the nature of the business: \_\_\_\_\_ and the number of employees: \_\_\_\_\_.

Net Worth of Investment Farm \$ \_\_\_\_\_

Net worth of Investment Farm includes the market value of land, buildings, machinery, equipment, inventory, etc. Investment farm debt means only those debts for which the investment farm was used as collateral. Do not include a farm that you live on and operate.

**Parent(s)**

Total current balance of cash, savings, and checking accounts \$ \_\_\_\_\_

Net Worth of Investments \$ \_\_\_\_\_

Investments include real estate (do not include the home you live in), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, 529 college savings plans, the refund value of 529 state prepaid savings plans, installment and land sale contracts (including mortgages held), commodities, etc. 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. Investments do not include the home you live in, the value of life insurance, retirement plans (pension funds, annuities, noneducation IRAs, Keogh plans etc.) or cash, savings, and checking accounts already reported in questions 43 and 87 of the FAFSA.

Net Worth of Business \$ \_\_\_\_\_

Net worth of Business includes the market value of land, buildings, machinery, equipment, inventory, etc. Business debt means only those debts for which the business was used as collateral. Do not include the value of a small business that you (or your spouse) own and control and that has 100 or fewer full-time or full-time equivalent employees. Please provide the nature of the business: \_\_\_\_\_ and the number of employees: \_\_\_\_\_.

Net Worth of Investment Farm \$ \_\_\_\_\_

Net worth of Investment Farm includes the market value of land, buildings, machinery, equipment, inventory, etc. Investment farm debt means only those debts for which the investment farm was used as collateral. Do not include a farm that you live on and operate.

Student's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent's Signature: \_\_\_\_\_ Date: \_\_\_\_\_