

2023-2024 Asset Worksheet

These figures MUST reflect your assets as of the date your original FAFSA was filed.

Student (and Spouse)	<u>Value</u>	<u>Debt</u>
I. Cash, savings and Checking account		
2. Investments		
nvestment value means the current balance or mark only those debts that are related to the investments. nvestments include real estate (do not include the market funds, mutual funds, certificates of deposit, stontracts (including mortgages held), commodities, education savings accounts (e.g., 529 college saving nvestments do not include the home you live in, the funds, annuities, non-education IRAs, Keogh plans, education savings accounts (e.g., 529 college saving nvestments do not include the home you live in, the funds, annuities, non-education IRAs, Keogh plans, education include the saving number of the funds of t	home you live in), trust funds, UC tocks, stock options, bonds, other etc. Investments also include qual gs plans and the refund value of 5 ne value of life insurance, retirem	GMA and UTMA accounts, money securities, installment and land sified educational benefits or 29 prepaid tuition plans). ent plans (401[k] plans, pension
B. Business		
Business value includes the market value and/or investment farm debt means only those debts Business value does not include the value percent of the business and the business has 100 or Parents	for which the business or investre of a small business if your family	ment farm was used as collateral. y owns and controls more than 50
Note: Section must be completed by parents of a dep	pendent student	
	<u>Value</u>	<u>Debt</u>
I. Cash, savings and Checking account		
2. Investments		
nvestment value means the current balance or mark only those debts that are related to the investments. nvestments include real estate (do not include the market funds, mutual funds, certificates of deposit, strontracts (including mortgages held), commodities, education savings accounts (e.g., 529 college saving nvestments do not include the home you live in, the	home you live in), trust funds, UC tocks, stock options, bonds, other etc. Investments also include qual gs plans and the refund value of 5 ne value of life insurance, retirem	GMA and UTMA accounts, money securities, installment and land sified educational benefits or 29 prepaid tuition plans). ent plans (401[k] plans, pension
nvestment value means the current balance or mark only those debts that are related to the investments. nvestments include real estate (do not include the market funds, mutual funds, certificates of deposit, standards (including mortgages held), commodities, education savings accounts (e.g., 529 college saving nvestments do not include the home you live in, though, annuities, non-education IRAs, Keogh plans, education includes annuities, non-education includes annuities.	home you live in), trust funds, UC tocks, stock options, bonds, other etc. Investments also include qual gs plans and the refund value of 5 ne value of life insurance, retirem	GMA and UTMA accounts, money securities, installment and land sified educational benefits or 29 prepaid tuition plans). ent plans (401[k] plans, pension
nvestment value means the current balance or mark only those debts that are related to the investments. nvestments include real estate (do not include the market funds, mutual funds, certificates of deposit, strontracts (including mortgages held), commodities, education savings accounts (e.g., 529 college saving nvestments do not include the home you live in, thunds, annuities, non-education IRAs, Keogh plans, each of the business value includes the market value and/or investment farm debt means only those debts Business value does not include the value percent of the business and the business has 100 or	home you live in), trust funds, UC tocks, stock options, bonds, other etc. Investments also include qualities plans and the refund value of 5 ne value of life insurance, retiremetc.) or cash, savings and checking the control of land, buildings, machinery, equals for which the business or investre of a small business if your family	GMA and UTMA accounts, money securities, installment and land sified educational benefits or 29 prepaid tuition plans). ent plans (401[k] plans, pensioning accounts already reported. Lipment, inventory, etc. Business nent farm was used as collateral. y owns and controls more than 50
nvestment value means the current balance or mark only those debts that are related to the investments. Investments include real estate (do not include the market funds, mutual funds, certificates of deposit, strontracts (including mortgages held), commodities, education savings accounts (e.g., 529 college saving investments do not include the home you live in, through annuities, non-education IRAs, Keogh plans, ed. Business Business value includes the market value and/or investment farm debt means only those debts includes the business has 100 or percent of the business and the business has 100 or percent of the business and the business has 100 or percent of the services.	home you live in), trust funds, UC tocks, stock options, bonds, other etc. Investments also include qualities plans and the refund value of 5 ne value of life insurance, retiremetc.) or cash, savings and checking of land, buildings, machinery, equal for which the business or investre of a small business if your family fewer full-time or full-time equivalence.	GMA and UTMA accounts, money a securities, installment and land so ified educational benefits or 29 prepaid tuition plans). The plans (401[k] plans, pensioning accounts already reported. Lipment, inventory, etc. Business ment farm was used as collateral. If yowns and controls more than 50 lent employees.
nvestment value means the current balance or mark only those debts that are related to the investments. nvestments include real estate (do not include the market funds, mutual funds, certificates of deposit, st contracts (including mortgages held), commodities, education savings accounts (e.g., 529 college saving nvestments do not include the home you live in, the unds, annuities, non-education IRAs, Keogh plans, each of the market value and/or investment farm debt means only those debts Business value does not include the value of the planes of the planes of the planes.	home you live in), trust funds, UC tocks, stock options, bonds, other etc. Investments also include qualities plans and the refund value of 5 ne value of life insurance, retiremetc.) or cash, savings and checking of land, buildings, machinery, equal for which the business or investre of a small business if your family fewer full-time or full-time equivalent.	GMA and UTMA accounts, money securities, installment and land sified educational benefits or 29 prepaid tuition plans). ent plans (401[k] plans, pensioning accounts already reported. Lipment, inventory, etc. Business nent farm was used as collateral. y owns and controls more than 50 lent employees.