

**Dependent Asset Information for 2026-2027**

DIRECTIONS: Complete all items below and return this form to the Office of Financial aid. **Asset Information should reflect value at the time the FAFSA was completed.** For each question, if net worth is one million dollars or more, enter 999,999. If net worth is negative, enter 0. Round all figures to the nearest whole dollar. **Do not leave any amount blank.**

**SECTION 1: ASSET INFORMATION**

**CASH, SAVINGS and CHECKING:** What was your and your parent's total balance of cash, savings and checking accounts? (Do not include student financial aid)

**STUDENT**

**PARENT(S)**

\$ \_\_\_\_\_

\$ \_\_\_\_\_

**INVESTMENTS:** What was the net worth of your parent's investments, including real estate? Do not include the home in which your parents live. Net worth is the current value of investments, businesses and/or investment farms minus debt related to the same investments. Use \$0 for investments or properties with a negative value. If net worth is negative, enter \$0.

**STUDENT**

**PARENT(S)**

\$ \_\_\_\_\_

\$ \_\_\_\_\_

**Investments include:** real estate (do not include your parent's home), 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 educational benefits or education savings accounts (e.g. Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans). If a student must report parent information on the FAFSA, 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 your parents 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 on the FAFSA. Do not include UGMA and 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.

**Continued**

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**BUSINESS and INVESTMENT FARMS: What was the net worth of your and your parent's businesses and/or investment farms ?**

**STUDENT**

**PARENT(S)**

\$ \_\_\_\_\_

\$ \_\_\_\_\_

**Businesses and investment farms include** businesses (including small or family-run businesses) owned by you that have more than 100 full-time (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

**Businesses and 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.

**SECTION 2: CERTIFICATION (Provide all required signatures and PUID below)**

Individuals indicated below must sign and date this form, certifying that all information provided is true, complete and accurate. **At least one parent must sign.**

STUDENT NAME: \_\_\_\_\_

PUID: \_\_\_\_\_

STUDENT SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

PARENT SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_