

## 2013-2014 Student Asset Verification Worksheet

Student's Name \_\_\_\_\_

SSN or MassBay ID \_\_\_\_\_

Further information is required before we can process your request for financial aid. For all questions, **use figures as of the date you completed the Free Application for Federal Student Aid (FAFSA)**. Do not leave any items blank.

**What was the total value of your (and your spouse's) cash, savings and checking account(s)?** \$ \_\_\_\_\_

**What was the net worth (value minus debt) of your (and your spouse's) investments?** \$ \_\_\_\_\_

- Investments include investment real estate (do not include the value of 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, installment and land sale contracts (including mortgages held), commodities, Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans for the student (and spouse).

**Do you (and/or your spouse) own real estate other than the home you live in?** YES NO

If you answered "YES," please answer the questions below. If you answered "NO," skip to the next question.

What is the address of the property? \_\_\_\_\_

What was the market value of the property? \$ \_\_\_\_\_

What was the amount owed on this property? \$ \_\_\_\_\_

What was the purchase price? \$ \_\_\_\_\_ What year was it purchased? \_\_\_\_\_

If you own more than one investment property, please answer the above questions for the additional properties on a separate sheet.

**Do you (and/or your spouse) rent out part of your primary home?** YES NO

If you answered "YES," please answer the questions below. If you answered "NO," skip to the next question.

What is the address of the property? \_\_\_\_\_

What is the total number of units in the property, including the unit you live in? \_\_\_\_\_

What was the market value of the property? \$ \_\_\_\_\_

What was the amount owed on this property? \$ \_\_\_\_\_

What was the purchase price? \$ \_\_\_\_\_ What year was it purchased? \_\_\_\_\_

**Do you (and/or your spouse) own a business? Answer "NO" if you are a sole proprietor and own no other businesses.**

YES NO

If you answered "YES," please answer the questions below. If you answered "NO," skip to the next question

What percentage of the business is family owned and controlled? \_\_\_\_\_%

How many full time and full time equivalent employees does the business employ? \_\_\_\_\_

What was the total value\* of the business? \$ \_\_\_\_\_

\* Value includes the market value of land, buildings, capital assets, inventory, etc.

What was the total debt \* of the business? \$ \_\_\_\_\_

\* Business debts are what you/spouse owe on the business. Include only debts for which the business was used as collateral.

**Do you (and/or your spouse) own an investment farm?** YES NO

If "YES," what is the net worth of the farm? \$ \_\_\_\_\_

Do you (and/or your spouse) live on and operate the farm? YES NO

**Statement of Certification: My signature certifies that the information provided above is true. I agree to provide proof of the information if requested.**

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

Date: \_\_\_\_\_