

CURRENT ASSETS

Student Name _____ ID _____

Please complete the form below so we can complete your financial aid process.

Information to answer questions below:

• **Investments** include real estate (but not the family home), 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. (e.g. Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans).

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.

- **Do NOT include** the value of the home you live in, the value of life insurance, retirement plans (401k plans, pension funds, annuities, or non-education IRAs, Keogh plans, etc.).
- **Business and/or investment farm value** includes the market value of land, buildings, machinery, equipment, inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral.
- **Do NOT include** the value of a family farm that you (your spouse and/or your parents) live on and operate. Do not include the value of a small business that you (your spouse and/or your parents) own and control that has 100 or fewer full-time or full-time equivalent employees.

Student Asset Information

As of today, what is your (and your spouse's) total current balance of cash, savings and checking accounts? (Q41) \$ _____

As of today, what is the net worth of your (and your spouse's) investments? See definition of *investments* explained above. (Q42) \$ _____
Net worth means current value minus debt.

As of today, what is the net worth of your (and spouse's) current businesses and/or investment farms? (Q43) \$ _____
See notes above on what to include and what you can exclude.

Parent Asset Information (if parent data required on FAFSA)

As of today, what is your parents' total current balance of cash, savings, and checking accounts? (Q90) \$ _____

As of today, what is the net worth of your parents' investments? See definition of *investments* explained above. (Q91) \$ _____
Net worth means current value minus debt.

As of today, what is the net worth of your parents' current businesses and/or investment farms? See notes above on what to include and what you can exclude. (Q92) \$ _____

Student signature _____ Date _____

Parent signature _____ Date _____
(if dependent student)

Return to Student Financial Services, Vincennes University, 1002 North First St., Vincennes, Indiana, 47591 or fax to 812-888-4261 or scan and attach to e-mail to fa@vinu.edu.