



**2024-25  
 STUDENT ASSET INFORMATION WORKSHEET**

COMPLETE WITH  
 BLACK INK ONLY.

The Free Application for Federal Student Aid (FAFSA) provides a snapshot of student (and spouse, if married) assets **on the date you originally completed the FAFSA**. Federal regulations do not allow these amounts to be updated after the initial FAFSA is filed, unless amounts originally reported were incorrect at the time the FAFSA was originally completed. We are requesting this worksheet because either 1) you did not answer the asset questions on the FAFSA, or 2) you changed the asset amounts on the FAFSA after it was completed.

If the answer to any question is zero or does not apply, please answer \$0.

<b>ASSETS OF STUDENT (AND SPOUSE, IF MARRIED)</b>					
<p><b>NET WORTH OF CASH, SAVINGS, AND CHECKING ACCOUNTS:</b></p> <p>1. <u>On the date you originally completed the 2024-25 FAFSA</u>, what was the total amount of your (and your spouse's, if married) cash, savings, and checking accounts?</p> <p>2. Did you change your answer to this asset question on the FAFSA after you originally completed the FAFSA?</p> <p>3. If YES, explain why you changed the amount you originally reported on the FAFSA:</p> <p>_____</p> <p>_____</p>	<p>\$ _____</p> <p><input type="checkbox"/> YES   <input type="checkbox"/> NO</p>				
<p><b>NET WORTH OF INVESTMENTS:</b></p> <p>1. <u>On the date you originally completed the 2024-25 FAFSA</u>, what was the total net worth of your (and your spouse's, if married) investments?</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width: 50%; padding: 5px;">INCLUDE:</th> <th style="width: 50%; padding: 5px;">DO NOT INCLUDE:</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px; vertical-align: top;"> <ul style="list-style-type: none"> <li>Real estate (but not the home you live in)</li> <li>Trust funds</li> <li>UGMA and UTMA accounts</li> <li>Money market funds, mutual funds, certificates of deposit</li> <li>Stocks, stock options, bonds (including savings bonds), other securities</li> <li>Coverdell savings accounts, 529 college savings plans, the refund value of 529 prepaid tuition plans, college savings plans owned by you (and your spouse, if married)</li> <li>Installment and land sale contracts (including mortgages held)</li> <li>Commodities</li> </ul> </td> <td style="padding: 5px; vertical-align: top;"> <ul style="list-style-type: none"> <li>The home you live in</li> <li>The value of life insurance</li> <li>Retirement plans (401K plans, pension funds, annuities), non-education IRAs, Keogh plans, etc.</li> <li>Educational savings accounts owned by your parent(s)/stepparent</li> <li>Cash, savings, and checking accounts reported above.</li> </ul> </td> </tr> </tbody> </table> <p>2. Did you change your answer to this asset question on the FAFSA after you originally completed the FAFSA?</p> <p>3. If YES, explain why you changed the amount you originally reported on the FAFSA:</p> <p>_____</p> <p>_____</p>	INCLUDE:	DO NOT INCLUDE:	<ul style="list-style-type: none"> <li>Real estate (but not the home you live in)</li> <li>Trust funds</li> <li>UGMA and UTMA accounts</li> <li>Money market funds, mutual funds, certificates of deposit</li> <li>Stocks, stock options, bonds (including savings bonds), other securities</li> <li>Coverdell savings accounts, 529 college savings plans, the refund value of 529 prepaid tuition plans, college savings plans owned by you (and your spouse, if married)</li> <li>Installment and land sale contracts (including mortgages held)</li> <li>Commodities</li> </ul>	<ul style="list-style-type: none"> <li>The home you live in</li> <li>The value of life insurance</li> <li>Retirement plans (401K plans, pension funds, annuities), non-education IRAs, Keogh plans, etc.</li> <li>Educational savings accounts owned by your parent(s)/stepparent</li> <li>Cash, savings, and checking accounts reported above.</li> </ul>	<p>\$ _____</p> <p><input type="checkbox"/> YES   <input type="checkbox"/> NO</p>
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