**Lander University Office of Financial Aid**
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09ASST

# 2008-2009 Net Worth of Available Assets Worksheet

**Student's Last Name** **First Name** **MI** **Lander ID Number**

Do not include the value of life insurance and retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc) anywhere on this form. Do not place an amount from one source in more than one box. There should not be duplication of any one source in these categories.

For each source, list the net worth for the student. If the student is required to report parental information on the FAFSA (see FAFSA instructions) you must also list the net worth for the parent in the column on the right. Net worth means current value minus debt. If net worth is one million or more, enter 999,999. If net worth is negative, enter zero. **Do not leave any space blank. If the source does not apply to you, please enter a zero.**

| STUDENT | SOURCE | PARENT |
|---|---|---|
| $ | Real estate (**Do not include the home you live in**): | $ |
| $ | Trust funds, UGMA and UTMA accounts: | $ |
| $ | Money market or mutual funds: | $ |
| $ | Certificates of deposit (CDs): | $ |
| $ | Stocks and stock options: | $ |
| $ | Bonds: | $ |
| $ | Other securities: | $ |
| $ | Coverdell savings accounts, 529 college savings plans, the refund value of 529 state prepaid tuition plans: **Note:** ** Students who must report parental information on the FAFSA MUST report the value of all items above IF owned by the parent. *If the account is owned by a student who must report parents' info on the FAFSA, the amount should NOT be reported. *If the account is owned by a student or student's spouse who is not reporting parental info, the value MUST be reported as an investment. See FAFSA instructions for questions 43-47 for students and questions 87-89 for parents available at http://studentaid.ed.gov/students/publications/completing_fafsa/2008_2009/ques.html.* | $ |
| $ | Installment and land sale contracts: | $ |
| $ | Commodities: | $ |
| $ | Business or investment farm net worth: ***Note:*** *Do not include **if** the business has 100 or fewer full-time or full-time equivalent employees and is owned and controlled by the student or parent (for dependent students). Business or investment farm value includes the market value of the land, buildings, machinery, equipment, inventory, etc. Business or investment farm debt means only those debts for which the business or investment farm was used as collateral.* *If the business meets the small business definition, check here: student_____Parent_____* | $ |
| $ | Cash, Savings, and Checking Accounts: | $ |
| **$** | **<---------- TOTAL ----------→** | **$** |

Comments/additional information (use back if needed):

Student Signature Date

Parent/Spouse Signature Date

| DATA ENTRY | | COUNSELOR REVIEW | |
|---|---|---|---|
| RRAAREQ | N=Pending Review | If meets small bus def, remove bus. net worth | |
| Initials/date | | Review Educational Accounts status to determine if included or not | |
| Fwd to Counselor date | | Update RNANAxx | |
| | | Calc need and update ROAUSDF efc and trans | |
| FSAH AVG Guide, ch. 1 and 2 | | RHACOMM | RRAAREQ – INCONS and add CORRP if corrected |
| FAFSA instructions | | CNSLR Initials/date | |
| | | | |