

**Student Name:** \_\_\_\_\_

**Hope Student ID #:** \_\_\_\_\_

We are reviewing your 2016-17 financial aid application and need clarification of your assets. Please provide the following information, noting the market value as of the date the FAFSA was filed. **If the response is "none", enter a zero under 'DOLLAR VALUE'.**

EXCLUDE the value of the home in which you live and the value of life insurance or retirement plans (pension funds, annuities, noneducation IRAs, Keogh plans, etc).

**STUDENT'S GENERAL ASSET INFORMATION**
**DOLLAR VALUE**

Cash, savings, and checking accounts: \$ \_\_\_\_\_

Trust funds: + \_\_\_\_\_

Stocks, stock options, bonds, other securities, and mutual funds: + \_\_\_\_\_

Money market funds: + \_\_\_\_\_

Certificates of deposit: + \_\_\_\_\_

Commodities: + \_\_\_\_\_

Coverdell Savings Accounts: + \_\_\_\_\_

529 College Savings Plans: + \_\_\_\_\_

UGMA and/or UTMA Account: + \_\_\_\_\_

Refund value of 529 State Prepaid Tuition plans (if owned by student – INDEPENDENT Students only) + \_\_\_\_\_

Net value of installment &amp; land sale contracts (including mortgages held): + \_\_\_\_\_

 "Other real estate", including rental property, land, second homes, etc.:  
 (market value minus debt – do not include the home you live in) + \_\_\_\_\_

**Other investments** including personal investment in a business or partnership

Type: \_\_\_\_\_ + \_\_\_\_\_

Type: \_\_\_\_\_ + \_\_\_\_\_

**TOTAL:** \$ \_\_\_\_\_

**STUDENT'S BUSINESS ASSET INFORMATION (Leave blank if not applicable.)**
***If you own more than one business, complete a separate form for each.***

 Is the business more than 50% family-owned and controlled?  YES  NO

 Does the business have 100 or fewer full-time equivalent employees?  YES  NO

1. What is the business worth today? (market value of land, buildings, machinery, equipment, inventory, etc.) \$ \_\_\_\_\_

2. What is the business-related debt today? (include only those debts for which the business was used as collateral) \$ \_\_\_\_\_

**STUDENT'S INVESTMENT FARM ASSET INFORMATION (Leave blank if not applicable.)**

 Is the farm your principal place of residence, and did you claim on Schedule F of your 2015 federal tax return that you "materially participated in the farm's operation"?  YES  NO

If No:

1. What is the farm worth today? (market value of land, buildings, machinery, equipment, inventory, etc.) \$ \_\_\_\_\_

2. What is the farm-related debt today? (include only those debts for which the farm was used as collateral) \$ \_\_\_\_\_

Return this completed form to the address listed below.

**Student Signature:** \_\_\_\_\_

**Date Signed:** \_\_\_\_\_