



# ASSET WORKSHEET

2008 - 2009

Office of Financial Aid ▪ Indiana University South Bend ▪ P.O. Box 7111 ▪ South Bend, IN 46634-7111

Print Student Name \_\_\_\_\_

University ID Number \_\_\_\_\_

Please provide the following asset information. All amounts should reflect assets held **as of today's date**. If you have any questions about this form, please contact the IU South Bend Office of Financial Aid at (574) 520-4357. Please complete the sections as checked here:

\_\_\_\_\_ If this line is checked, complete the Student/Spouse section

\_\_\_\_\_ If this line is checked, complete the Parent(s) section (on reverse)

\_\_\_\_\_ If this line is checked, complete both the Student and Parent(s) sections

## Definitions:

**Net Worth:** The current value minus the current debt. **If net worth is 0 (zero) or any debt is larger than the respective value, provide a detailed explanation on the back of this form.**

**Investments:** Include real estate (other than your home), trust funds, money market funds, mutual funds, certificates of deposit, stocks, bonds, other securities, education IRAs, installment and land sale contracts (including mortgages held), commodities, etc.

**Business and/or Investment Farm:** Include 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 farm was used as collateral.

**Farm Value and Farm Debt:** Refers only to an investment farm. Do not include a farm on which you live and operate.

## SECTION I: STUDENT/SPOUSE

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

Investments:

Value \$ \_\_\_\_\_ - Debt \$ \_\_\_\_\_ = Net Worth \$ \_\_\_\_\_

Business/Farm:

Value \$ \_\_\_\_\_ - Debt \$ \_\_\_\_\_ = Net Worth \$ \_\_\_\_\_

If the investment, business, or farm has been sold, please indicate date this occurred: \_\_\_\_\_

**PARENT SECTION AND CERTIFICATION ON REVERSE**

