

**ASIR**

## **Asset Information Request Form**

**2012-2013**

### PURPOSE OF FORM

Generally, the Asset Information Request Form is requested to clarify a discrepancy in asset values reported on the Free Application for Federal Student Aid (FAFSA) and CSS PROFILE or University Financial Aid Application. In addition, this form may be requested to collect asset values that may not have been reported on an application.

If you are dependent for financial aid purposes and are required to report parent information, enter values under the Dependent Student Column when provided with this option. If you are independent for financial aid purposes, enter values under the Independent Student Column when provided with this option.

### GENERAL INSTRUCTIONS

All assets, including those held in countries other than the United States, should be reported in U.S. dollars. Please report values **as of the date you filed your initial 2012-2013 FAFSA**. If additional room is needed please attach separate pages. Do not leave any lines blank. Enter zero or n/a if a line does not apply.

#### Section 2. Investments

Do not report the value of qualified retirement investments such as 401(k), 403(b), IRA, or Keogh accounts.

Uniform Trust/Uniform Gifts to Minors (UTMA/UGMA) – these accounts are considered a student asset and the value should be reported in the student column.

Bonds, savings bonds, education bonds – be sure to report values for Series EE savings bonds.

#### Section 3. Other Real Estate

Do not report the value of your primary residence. Primary residence is defined as the home in which your parents (or you, if independent) currently live. Generally, present market value is the true, underlying value of the asset and may not be the same as the tax assessed value.

#### Section 5. Business Assets

The definition of family for this section includes: 1) person directly related to you, such as a parent, sister or cousin, or 2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law.

#### Section 7. Trust Funds

Trust funds must be reported even if the beneficiary's access is restricted or if proceeds or distributions of the trust will not be received during the award year. If the trust is restricted by court-order for specific expenses (i.e. to pay for future surgery for the victim of a car accident), you must submit court documentation to verify the restriction. Please review the Trust Information Form on our website for detailed information.

Student Financial Services may request third-party documentation to confirm the values you report on your Asset Information Request Form. Should you submit a form with incorrect information, you must also submit third-party documentation to confirm the correct values. Adjustments to a financial aid award as a result of submitting documentation to correct an Asset Information Request form are neither guaranteed nor immediate.

Incomplete forms or forms received without the appropriate signature(s) are considered incomplete and will need to be resubmitted.

**ASIR** **Parent and Student Asset Information Request**  
**2012-2013**

Student's University ID:     -      or SIS ID:

Student's Full Name: \_\_\_\_\_  
 (LEGAL NAME - PRINT) first middle last

Report all assets, domestic and foreign, in U.S. dollars.

**1. CASH, SAVINGS AND CHECKING ACCOUNTS**

List the value of all cash on hand, savings account and checking accounts.

Please report the required information for each applicable family member:	Dependent Student		Independent Student	
	Parent(s)	Student	Student	Spouse
TYPE OF ASSET OR INVESTMENT				
Cash Balance				
Checking Account Balance				
Savings Account Balance				
TOTAL				

**2. INVESTMENTS**

*(Do not include qualified retirement investments such as 401(k), 403(b), IRA, or Keogh accounts.)*

Investment value is the current balance or market value of these investments as of your FAFSA filing date.

Please report the required information for each applicable family member:	Dependent Student		Independent Student	
	Parent(s)	Student	Student	Spouse
TYPE OF ASSET OR INVESTMENT				
Trust Funds (see Section 7 below)				
Uniform Trust/Uniform Gifts to Minors				
Stocks, stock options, mutual funds				
Bonds, savings bonds, education bonds				
Money market funds				
Certificate of Deposits (CDs)				
Non-qualified (non-retirement) annuities				
Commodities				
Installment and land sale contracts				
Other investments not listed above				
TOTAL				

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**3. OTHER REAL ESTATE (completed by dependent and independent students)**

List each address or name of each property with the value and debt of that property as of your FAFSA filing date.  
 Do not include the primary residence in which you live.

PROPERTY ADDRESS	PRESENT MARKET VALUE	DEBT OR PRINCIPAL OWED	WHO OWNS THE PROPERTY?

**4. EDUCATION BENEFITS & COLLEGE SAVINGS PLANS**

For a dependent student, the accounts are reported as parental investments. This includes all accounts owned by the student and all accounts owned by the parents for any member of the household. For an independent student, report the accounts owned by the student (and/or the student's spouse).

Please report the required information for each applicable family member:	Dependent Student		Independent Student	
	Value	Owner(s) of Account	Value	Owner of Account
Education Savings Account: value for student and all members of the household				
529 Prepaid Tuition Plan (refund value): value for student and all other members of the household				

**5. BUSINESS ASSETS (completed by dependent and independent students)**

Business present market value includes the market value of land, buildings, machinery, equipment, inventory, etc.  
 Business debt or principal owed means only those debts for which the business was used as collateral.

BUSINESS NAME	PRESENT MARKET VALUE	DEBT OR PRINCIPAL OWED	WHO OWNS THE BUSINESS?	
Does your family own and control more than 50% of the business?			<input type="checkbox"/> yes	<input type="checkbox"/> no
Does the business have 100 or fewer employees?			<input type="checkbox"/> yes	<input type="checkbox"/> no

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**6. FARM ASSETS (completed by dependent and independent students)**

Farm present market value includes the market value of land, livestock, buildings, machinery, equipment, inventory, etc. Farm debt or principal owed means only those debts for which the farm was used as collateral.

FARM NAME	PRESENT MARKET VALUE	DEBT OR PRINCIPAL OWED	WHO OWNS THE FARM?	
Does your family (you and/or your parents) live on the farm?			<input type="checkbox"/> yes	<input type="checkbox"/> no
Does your family (you and/or your parents) materially participate in the farm operations?			<input type="checkbox"/> yes	<input type="checkbox"/> no

**7. TRUST FUNDS (completed by dependent and independent students)**

If the student and/or parents (if dependent) or spouse (if independent) have any trusts, additional information must be submitted to our office. Please review the Trust Information Request form on our website for detailed information.

**CERTIFICATION STATEMENT:** I certify that all the information reported to qualify for federal aid is complete and correct to my knowledge. If additional documentation is required, I will submit those documents in a timely manner. I understand that if I purposely give false or misleading information, I may be fined, sentenced to jail, or both and my financial aid may be terminated.

STUDENT SIGNATURE \_\_\_\_\_ Date \_\_\_\_\_

PARENT SIGNATURE \_\_\_\_\_ Date \_\_\_\_\_  
 (Required for dependent students only)