

2010-2011

Student/Parent Asset Information

www.kellogg.edu/financial

Student Name (Please Print Legibly)

Student ID#

The following information is required to complete your financial aid application. Please complete all applicable sections below with current values and return to KCC Financial Aid.

Student Asset Information

1. **As of today**, what is the net worth of your (and spouse's) current investments? \$ \_\_\_\_\_
2. **As of today**, what is the net worth of your (and spouse's) current businesses and/or investment farms? \$ \_\_\_\_\_
3. **As of today**, what is your (and spouse's) total current balance of cash, savings, and checking accounts? (Do NOT include student financial aid.) \$ \_\_\_\_\_

Student Signature

Date

Parent Asset Information (for Dependent Students Only)

1. **As of today**, what is the net worth of your parent's current investments? \$ \_\_\_\_\_
2. **As of today**, what is the net worth of your parent's current businesses and/or investment farms? \$ \_\_\_\_\_
3. **As of today**, what is your parent's total current balance of cash, savings, and checking accounts? (Do NOT include student financial aid.) \$ \_\_\_\_\_

Parent Signature

Date

Information to assist in answering the asset questions:

**Family net worth** means current value minus debt. If net worth is one million or more, enter \$999,999. If net worth is negative, enter 0.

**Investments include** real estate (do not include the home you live in) trust funds, UGMA, UTMA, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, college savings plans, installment and land sale contracts (including mortgages held), commodities, etc. Investment value includes the market value of these investments as of today. Investment debt means only those debts related to the investments.

**Investments do not include** the home you live in, the value of life insurance, retirement plans (pension funds, annuities, noneducation IRA's, Keogh plans, etc.) and prepaid tuition plans, cash, savings, and checking accounts already reported on Questions 42 and 93 on the FAFSA Form. UGMA AND UTMA accounts for which you are the custodian, but not the owner.

**Business and/or investment farm value** includes 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 investment farm was used as collateral.

Investment farm value does not include the value of a family farm that you (your spouse/or your parents) live on and operate.