

**Financial Aid**

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www.kellogg.edu/financial-aid

**2019-2020**  
**Student/Parent**  
**Current Asset Information**

**AST**

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

Student ID# \_\_\_\_\_

**STUDENT ASSET INFORMATION**

1. **As of today**, current balance of cash, savings, and checking account for student (and spouse):  
\$ \_\_\_\_\_
2. **As of today**, current Net Worth of investments for student (and spouse):  
\$ \_\_\_\_\_
3. If you own a business, do you have more than 100 employees?       YES     NO
4. Do you reside on a farm?       YES     NO  
(If yes, answer question 5)
5. As of today, total Net Worth of current businesses and/or investment farms?  
\$ \_\_\_\_\_
6. Student Signature: \_\_\_\_\_  
Date: \_\_\_\_\_

**PARENT ASSET INFORMATION**

1. **As of today**, current balance of cash, savings, and checking account for parent (and spouse):  
\$ \_\_\_\_\_
2. **As of today**, current Net Worth of investments for parent (and spouse):  
\$ \_\_\_\_\_
3. If you own a business, do you have more than 100 employees?       YES     NO
4. Do you reside on a farm?       YES     NO  
(If yes, answer question 5)
5. As of today, total Net Worth of current businesses and/or investment farms?  
\$ \_\_\_\_\_
6. Parent Signature: \_\_\_\_\_  
Date: \_\_\_\_\_

**HELPFUL ASSET INFORMATION**

**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 zero (0).

**Investments** debt means only those debts related to the 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. Do not include the home you live in, the value of life insurance, retirement plans (pension funds, annuities, non-educational IRA's, Keogh plans, etc.) and prepaid tuition plans, cash, savings, and checking accounts already reported on the FAFSA online application. UGMA & UTMA accounts, such as 529 plans, 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.