Office of Student Financial Services
12 East 53rd St, New York, NY 10022
sfs@limcollege.edu
Phone: 212-310-0689
Fax:212-750-3452

2023-2024 Assets and Investments Statement

The following information is required because your 2021 tax return shows assets and/or investments that you did not report the "net worth" for on your 2023-2024 Free Application for Federal Student Aid (FAFSA). **All assets should be reported as of the date that you originally signed the 2023-2024 FAFSA. (Use black or blue ink only. No cross-outs or white-outs.)**

STUDENT INFORMATION

_____ _____ _____
Last Name First Name MI

_____ _____@limcollege.edu
LIM ID LIM Email

INSTRUCTIONS

- Market value means the value of the investment if it was sold **on the date you filed your FAFSA**.

DO NOT INCLUDE

- UGMA and UTMA accounts for which you are the custodian, but not the owner
- Retirement plans and whole life insurance

ASSET AND INVESTMENT INFORMATION

	STUDENT AND SPOUSE (if applicable)	PARENT(S) (if dependent)
	Asset Value	**Asset Value**
Cash, Savings, and Checking Accounts	$	$
	Investment Market Value	**Investment Market Value**
Stocks, Stock Options, Bonds, Other Securities, Commodities, Mutual Funds, Money Market Funds	$	$
UTMA, UGMA, College saving plans, Coverdell education savings accounts, Trust funds	$	$

Certification Statement: ***Handwritten signature(s) ONLY***
By signing this form, I/we certify that all the information on this form is accurate and complete.

Student Signature:	Date:
Parent Signature (Dependent Student Only):	Date: