



2018-2019 Assets, Investments and Property Statements

You are required to fill out this form because you indicated on your Free Application for Federal Student Aid (FAFSA) that you and/or your parent(s) have assets or investments. If your parents are recently divorced or legally separated, and your parents have jointly owned assets, report your custodial parent’s portion only. If a section does not pertain to you, please indicate zero or not applicable (N/A). **Do not leave any spaces blank.**

STUDENT INFORMATION

Last Name	First Name	MI
ID	LIM Email _____@limcollege.edu	

ASSETS AND INVESTMENTS STATEMENT

Most assets are investments such as college savings plans, Coverdell education savings accounts, 529 college savings plans (including refunds from prepaid 529 plans and plans owned by someone other than you or your parents), real estate, installment and land sale contracts (including mortgages held), trust funds, mutual funds, money market funds, UGMA and UTMA accounts, certificates of deposit, stocks, stock options, bonds, commodities, and precious metals. If the asset isn’t a business or investment farm, it is reported as an investment. **Indicate the current value of your investments, as of the date the FAFSA was filed, minus any debt.** Investment value means the current balance or market value of these investments as of the date this form was signed. Investment debt means only those debts that are related to the investment. **For all negative numbers, enter zero “0”.**

Do not include:

- ❖ Possessions such as a car, a stereo, clothes, or furniture
- ❖ A family’s principal place of residence, even if it is part of a business
- ❖ A family farm (including equipment, livestock, etc.) if:
 1. it is the principal place of residence for the applicant and his/her family (spouse or, for dependent students, parents),
 - AND
 2. The applicant (or parents of a dependent student) materially participated in the farming operation.
- ❖ Family-owned and controlled small businesses

Assets and Investments	Student and Spouse			Parent(s)		
	Value of Asset	Debt Remaining	Total	Value of Asset	Debt Remaining	Total
Cash, Savings, and Checking Accounts	\$		\$	\$		\$
Investments and Real Estate (As defined by the FAFSA instructions)	\$	\$	\$	\$	\$	\$
S-Corp	\$	\$	\$	\$	\$	\$
Partnership	\$	\$	\$	\$	\$	\$
What percentage of the S-Corp and/or Partnership do you own?						

