

Asset Statement

Student's Printed Name

Date of Birth

While reviewing your application for need-based financial aid, we determined that we need additional information regarding your family's assets. Please complete the form below and return to our office as soon as possible. We will not be able to continue our review of your file until this information is received and reviewed.

Instructions for completing this form can be found on the reverse side. If you need additional assistance please contact our office and we will be happy to help you.

NOTE: Answers must reflect values as of the day you completed the Free Application for Federal Student Aid (FAFSA).

	Custodial Parent(s) Assets	Student (& Spouse) Assets
A) Cash, savings & checking accounts	\$	\$
B) Value of all investments. Do not include real estate.	\$	\$
C) Investment debt. Do not include real estate.	\$	\$
D) Prepaid tuition plans (529/Coverdell)	\$	\$
E) Business value	\$	\$
F) Business debt	\$	\$
G) Investment farm value. Do not include a family farm.	\$	\$
H) Investment farm debt. Do not include a family farm.	\$	\$
I) Primary residence value	\$	\$
J) Primary residence debt	\$	\$

Other real estate: Please complete the following chart if you own real estate other than your home. Attach an additional sheet if you own more than five properties.

	Property #1	Property #2	Property #3	Property #4	Property #5
Address					
City & State					
Current Market Value					
Current Debt					
Purchase Year					
Purchase Price					

You may provide additional information in the comments section. If more space is needed, provide a separate page with the student's name and ID.

By signing this worksheet, we certify that all information reported is complete and correct. At least one parent must sign this form. Failure to complete this form in its entirety may cause processing delays.

Student Signature

Parent Signature

Date

Prospective students All documents must be submitted to IDOC at idoc.collegeboard.org.

Current students All documents must be submitted to IDOC at idoc.collegeboard.org.

Contact our office at finaid.jhu.edu/contact for more information.

Comments:

Parent Asset Information

Please list assets for your custodial parent(s) only. If your separated/divorced parents have jointly owned assets, list only your custodial parent(s) portion of the assets. **Note: values are the market value as of the day you filed your original FAFSA.**

Cash, savings & checking accounts: Include the current balance of your parent(s) cash, savings & checking account(s).

Investment values include: trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc.

Prepaid tuition plans (529/Coverdell): For a student who must report parental information, the accounts are reported as parental investments, including all accounts owned by the student and all accounts owned by the parents or any member of the household.

Investments DO NOT include: the home you live in, the value of life insurance, retirement plans (401(K) plan, pension funds, annuities, non-education IRAS, Keogh plans, etc.) or cash, savings and checking accounts reported separately. Investments also do not include UGMA and UTMA accounts for which you are the custodian, but not the owner.

Other real estate & investment debt includes: only those debts that are related to the listed investments.

Business value includes: market value of land, buildings, machinery, equipment, inventory, etc.

Business debt includes: the debts for which the business was used as collateral.

Investment farm value includes: market value of land, buildings, machinery, equipment, inventory, etc.

Investment farm debt includes: only the debts for which the investment farm was used as collateral.

Primary residence value includes: market value of your primary residence.

Primary residence debt includes: only the debts against your primary residence.

Student (& Spouse) Asset Information

Please list all assets that belong to you, the student. If you (the student) are married, then you must report all assets that are listed in either of your names. **Note: values are the market value as of the day you filed your original FAFSA.**

Cash, savings & checking accounts: Include the current balance of your parent(s) cash, savings & checking account(s).

Investment values include: trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc.

Prepaid tuition plans (529/Coverdell): For a student who does not report parental information, the accounts owned by the student (and/or student's spouse) are reported as student investments.

Investments DO NOT include: the home you live in, the value of life insurance, retirement plans (401(K) plan, pension funds, annuities, non-education IRAS, Keogh plans, etc.) or cash, savings and checking accounts reported separately. Investments also do not include UGMA and UTMA accounts for which you are the custodian, but not the owner.

Other real estate & investment debt includes: only those debts that are related to the listed investments.

Business value includes: market value of land, buildings, machinery, equipment, inventory, etc.

Business debt includes: the debts for which the business was used as collateral.

Investment farm value includes: market value of land, buildings, machinery, equipment, inventory, etc.

Investment farm debt includes: only the debts for which the investment farm was used as collateral.

Primary residence value includes: market value of your primary residence.

Primary residence debt includes: only the debts against your primary residence.