



2022-2023 Asset Information Form

Student's Name _____ PSU ID # _____

In order to continue processing your financial aid application, the PSU Financial Aid Team needs additional information regarding the value of your family's assets. We are requesting this information because (1) you were allowed to skip this section or not fully complete it on your FAFSA and it is now required for us to complete verification, OR (2) information we have indicates that you and/or your family may possess one or more of these types of assets.

**** All lines MUST be completed. Do not leave any space blank. Please enter "NA" if not applicable. ****

| Category of Asset | Parent Asset Values as of <u>Date FAFSA was Filed</u> | Student (and Spouse, if married) Asset Values as of <u>Date FAFSA was Filed</u> |
|---|--|---|
| Total current balance in cash, savings, and checking accounts? <i>Do not include student financial aid.</i> | | |
| Investment net worth, including real estate. <i>Do not include the home you live in.</i> | | |
| Net worth of current businesses. <i>Do not include a family farm or business with 100 or fewer full-time, or full-time equivalent employees.</i> | | |

Net worth means the current value, as of the day the 2022-2023 FAFSA was filed, of investments, businesses, and/or investment farms, minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use 0 for investments or properties with a negative value. See page 2 of this form for additional clarification.

PSU requires all students/families to submit all required Verification forms four weeks prior to the end of the term for which aid is requested. Please sign and date this form.

By signing this worksheet, you certify that all of the information provided is true and complete to the best of your knowledge and you agree, if asked, to provide information that will verify the accuracy of what has been reported on this form. *If you purposely give false or misleading information, you may be fined up to \$20,000, sent to prison, or both.*

Student's Signature
(Electronic signatures will not be accepted.)

Date

Spouse's Signature (Optional)

Date

Parent's Signature
(Electronic signatures will not be accepted.)

Date

Student Financial Services, 17 High Street, MSC #19, Plymouth, NH 03264

Phone (603) 535-2338; Toll Free (877) 846-5755; Fax (603) 535-2627; psu-sfs@plymouth.edu; go.plymouth.edu/aid

Net worth means the current value, as of today, of investments, businesses, and/or investment farms, minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use 0 for investments or properties with a negative value.

Investments include real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), 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.

Investments also include qualified educational benefits or education savings accounts (e.g., Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans). For a student who does not report parental information, the accounts owned by the student (and/or the student's spouse) are reported as student investments in question 41. For a student who must report parental information, the accounts are reported as parental investments in question 89, including all accounts owned by the student and all accounts owned by the parents for any member of the household.

Money received, or paid on your behalf, also includes distributions to you (the student beneficiary) from a 529 plan that is owned by someone other than you or your parents (such as your grandparents, aunts, uncles, and non-custodial parents). You must include these distribution amounts in question 44i.

Investments do not include the home you live in, the value of life insurance, ABLE accounts, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings and checking accounts already reported in questions 40 and 88.

Investments also do not include UGMA and UTMA accounts for which you are the custodian, but not the owner. Investment value means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments.

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.

Business value does not include the value of a small business if your family owns and controls more than 50 percent of the business and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, your family includes (1) persons directly related to you, such as a parent, sister or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law.

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