



Financial Aid Services  
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P.O. Drawer 7007  
Greenville, NC 27835

### 2009-2010 Asset Information

\*\* Please read the following information below and answer any questions that may apply to you (student) and/or parent.

#### Types of asset information to include or not include in your answers.

Investments include real estate (**Do not include the family home**), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, 529 college savings plans, the refund value of 529 state prepaid tuition plans, installment and land sale contracts (**including mortgages held**), commodities, etc. For more information about reporting educational savings plans call 1-800-444-3243. 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.

**\*\*\*Do not include the value of life insurance, retirement plans (pension funds, annuities, noneducation IRAs, Keogh plans, etc.) or cash, savings, and checking accounts previously reported.**

1. As of today, what is the net worth of investments, including real estate (not the family home)?  
**(Net worth means current value minus debt)**

Parent: \$ \_\_\_\_\_ and / or Student: \$ \_\_\_\_\_

2. As of today, what is the net worth of the current business and/or investment farms?

**Do not include** the value of a family farm that you and/or parents live on and operate.  
**Do not include** the value of a small business that you and/or parents own and control and that has 100 or fewer full-time or full-time equivalent employees.

Parent: \$ \_\_\_\_\_ and / or Student: \$ \_\_\_\_\_

3. As of today what is you (your spouse's) total current balance of cash, savings and checking?

Parent: \$ \_\_\_\_\_ and / or Student: \$ \_\_\_\_\_

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Students ID or SS# : \_\_\_\_\_