

STUDENT ASSET

One Stop Student Services
 105 Behmler Hall
 600 East 4th Street
 Morris MN 56267-2132

This form is used when additional documentation is required to support the changes made on the Free Application for Federal Student Aid (FAFSA). If there are differences, FAFSA information may need to be corrected.

320-589-6046
 Fax: 320-589-1673
ummonestop@morris.umn.edu

Complete this form, add the required signature in black or blue ink, and return to the One Stop. Indicate your name and student ID number on all required documentation. Processing of your financial aid is on hold until this information is received.

| Student Information | |
|--|----------------------------|
| Legal Name (last, first, middle initial) | Student ID Number |
| Preferred Name | Preferred Telephone Number |

| Asset Information | |
|--|----------|
| List the net worth (value minus debt) of the following assets as of the date you signed the original FAFSA. | |
| <input type="checkbox"/> Balance of cash, savings and checking accounts (enclose bank statement(s) listing these accounts) | \$ _____ |
| <input type="checkbox"/> Net worth (Net worth means current value minus debt. If net worth is negative, enter 0.) (enclose supporting documentation) | \$ _____ |
| <p>Investments include real estate (do not include the home you live in), 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.</p> <p>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 42. For a student who must report parental information, the accounts are reported as parental investments in question 91, including all accounts owned by the student and all accounts owned by the parent(s) for any member of the household.</p> <p>Investments do not include the home you live in, the value of life insurance, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings and checking accounts already reported in questions 41 and 90.</p> <p>Investments also do not include UGMA and UTMA accounts for which you are the custodian, but not the owner.</p> | |
| <input type="checkbox"/> Investment value (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.) (enclose supporting documentation) | \$ _____ |
| <p>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.</p> <p>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.</p> <p>Investment farm value does not include the value of a family farm that you, your spouse, and/or your parent(s) live on and operate.</p> | |

| Certification | |
|--|------|
| By signing this form, I certify that all the information reported is complete and correct. | |
| Student Signature | Date |

To request this form in an alternative format, please contact the Disability Resource Center at 320-589-6178 or oas@morris.umn.edu.