

Student's Asset Statement 2011-2012

UNIVERSITY OF VERMONT
Student Financial Services
223 Waterman Building
Burlington, VT 05405
FAx: (802) 656-4076

Student's Name: _____ Student ID #: 95 _____

Please complete the following information reporting the value of your assets as of the date of filing the 2011-2012 Free Application for Federal Student Aid (FAFSA).

- ⇒ If you are a single, divorced or separated student, report only your own assets and debts.
- ⇒ If you are married, report your own AND your spouse's assets and debts.
- ⇒ Complete the entire form unless otherwise instructed.

I. CASH, SAVINGS, & CHECKING ACCOUNTS

➤ ***If a section does not apply to you, write in "0"***

Include cash, savings, and checking balances as of the date you completed the FAFSA.

Description of Account	Balance (as of the date of FAFSA filing)
Example: US Bank (Checking)	\$\$\$\$

II. INVESTMENTS

➤ ***If a section does not apply to you, write in "0"***

Include stocks, bonds, mutual funds, money market funds, certificates of deposit, trust funds, tax exempt funds, etc. Do not include IRA/Keogh pension funds or other formal retirement annuities. If you reported interest/dividend income on your 2010 Federal Income Tax Return, be sure to include the principal value of those assets that produced the interest/dividend income. List additional assets on the opposite side.

Description of Investment	2010 Interest/Dividends	Value (As of the date of FAFSA Filing)
Example: Stock (50 shares)	Example: \$384	Example: \$6400

III. REAL ESTATE (OTHER THAN PRIMARY RESIDENCE)

➤ ***If a section does not apply to you, write in "0"***

Include rental properties (incl. rented duplex), second or summer home(s), land, installment sales, etc.

Street Address _____
 Property Description _____
 1. Date of Purchase: ____/____/____ Purchase Price.... \$ _____
 2. Current market/resale value.....\$ _____
 3. Current amount of unpaid mortgage principal.....\$ _____

Street Address _____
 Property Description _____
 1. Date of Purchase: ____/____/____ Purchase Price....\$ _____
 2. Current market/resale value.....\$ _____
 3. Current amount of unpaid mortgage principal.....\$ _____

IV. BUSINESS (ONLY COMPLETE IF THE BUSINESS HAS OVER 100 EMPLOYEES)

➤ ***If a section does not apply to you, write in "0"***

If you (and/or your spouse) own a business, write in how much the business is worth today. Include the value of land, buildings, machinery, equipment, inventories, etc.. Then, write in what you (and/or your spouse) owe on the business. If you (and your spouse) are not the sole owners, write in only your share of the total value and debt.

1. Current market/resale value of business.....\$ _____
 2. Amount of unpaid business debt.....\$ _____
 3. Estimated number of employees..... _____

V. INVESTMENT FARM

➤ ***If a section does not apply to you, write in "0"***

If you (and/or your spouse) own a farm, write in how much the farm is worth today. Include the value of land, buildings, machinery, equipment, livestock, inventories, etc.. Don't include the value of the home even if it is part of the farm. Then, write in what you (and/or your spouse) owe on the farm. Do not include a family farm, (a "family farm" is defined as one that serves as a principal place of residence and one on which you materially participated in the farm's operation).

1. Current market/resale value of farm.....\$ _____
 2. Amount of unpaid farm debt.....\$ _____

NOTE: Attach an additional sheet for completion of this form if necessary for any items listed above.

Student's Signature _____ Date _____

Spouse's Signature _____ Date _____

Daytime Phone # _____ E-mail address _____