

1ST REQUEST

2ND REQUEST

FINAL REQUEST



Office of Financial Aid  
www.fredonia.edu/finaid/

**Asset Request**

209 Maytum Hall  
Phone #: 716-673-3253  
Fax #: 716-673-3785

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date \_\_\_\_\_

I.D. # \_\_\_\_\_

Part of the Verification process requires that you report your asset information using the figures as of the day the FAFSA was completed. \_\_\_\_\_

Please complete this form, sign and return to the Financial Aid Office. Do not leave any questions blank. If an answer is zero, please enter 0.

Due to a change in assets reported on the FAFSA, we now need documentation on the below (i.e. copy of bank statement).

**Student Assets**

**Parent Assets**

Checking/savings \_\_\_\_\_

Checking/savings \_\_\_\_\_

Investment Net Worth \_\_\_\_\_

Investment Net Worth \_\_\_\_\_

Business/Farm Net Worth \_\_\_\_\_

Business/Farm Net Worth \_\_\_\_\_

Student signature \_\_\_\_\_

Parent signature \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_

**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. **Investments also include** qualified educational benefits or education savings accounts such as Coverdell savings accounts, 529 college savings plans and the refund value of 529 pre-paid tuition plans. For a student who does not report parental information, the accounts owned by the student (and the student's spouse) are reported as student investments. 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 for any member of the household.

**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. 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. Net worth means current value minus debt. If net worth is negative, enter 0.

**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 that you (your spouse and/or your parents) own and control and that has 100 or fewer full-time or full-time equivalent employees. **Investment farm value does not include** the value of a family farm that you (your spouse and/or your parents) live on and operate.

**We are unable to process your Financial Aid until we receive this form completed and signed**