



University of Michigan – Flint
 Office of Financial Aid
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**2009-2010
 ASSET INFORMATION WORKSHEET**

Name: _____ UMID: _____

Please complete the following items. **The figures should represent the value of the assets as of the date the 2009-10 FAFSA was completed.** *Dependent students* should provide the information for themselves and their parents. *Independent students* should provide the information for the student and/or spouse.

	Student	Parent/Spouse
Cash/Savings/Checking	\$ _____	\$ _____
Investments (current market value) <ul style="list-style-type: none"> • 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 prepaid tuition plans, installment and land sale contracts (including mortgages held), commodities, etc. • Do not include the value of life insurance and retirement plans (pension funds, annuities, IRA's, Keogh plans, etc.) or the value of prepaid tuition plans. 	\$ _____	\$ _____
Investments (current debts) <ul style="list-style-type: none"> • Indicate how much is owed on real estate and investments. 	\$ _____	\$ _____
Business (market value) <ul style="list-style-type: none"> • Business value includes all property, inventory, equipment, etc. • Note: line 12 of the 1040 is NOT the market value or debt. • Note: Exclude the net worth of a family-owned small business, owned and controlled by the student or the dependent student's parent(s), that has 100 or fewer full-time (or full-time equivalent) employees. 	\$ _____	\$ _____
Business (current debts) <ul style="list-style-type: none"> • Indicate how much is owed on the business. 	\$ _____	\$ _____
Investment Farm (market value) <ul style="list-style-type: none"> • Don't include a farm that you or your parents live on and operate. 	\$ _____	\$ _____
Investment Farm (current debts) <ul style="list-style-type: none"> • Indicate how much is owed on the farm. 	\$ _____	\$ _____

Student Signature: _____ Date: _____
 Parent/Spouse Signature: _____ Date: _____