

Student Asset Information

2024-2025 (Fall 2024, Spring 2025, Summer 2025)



Office of Financial Aid
UNIVERSITY OF COLORADO BOULDER

Name: _____
Student's Name (Last, First, M.I.)

ID: _____
Student Identification Number (SID)

This form is used to verify student savings, investments and business value to determine eligibility to receive financial aid. Additional documentation may be requested.

1. Please provide the following amounts as of the date the FAFSA was submitted:

	Amount
Students' total balance of cash, savings and checking accounts	\$ _____
Students' net worth of investments <i>529 plans held in parents' and/or student's names are to be reported under parent investment net worth. Students shouldn't report 529 plans here unless no parent information was provided on the FAFSA. Include other real estate, but do not include value of the home you live in.</i>	\$ _____
Students' net worth of current businesses and/or investment farms	\$ _____

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

Investments include real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), 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 (e.g., Coverdell savings accounts and, if the student is not the beneficiary, 529 college savings plans and the refund value of 529 prepaid tuition plans). Parents of dependent students should not report the value of educational savings accounts for other children. 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 22. For a student who must report parental information, the accounts are reported as parental investments in question 40, 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, ABLE accounts, 529 college savings plans if the student is the beneficiary, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings or checking accounts.
- UGMA and UTMA accounts for which you are the custodian, but not the owner.

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 include 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.

2. By signing this form, I certify that all the information provided is complete and accurate.

Student signature
Electronic and typed signatures are not acceptable.

Date

Please submit your form by mail or online at www.colorado.edu/financialaid/forms/secure-document-upload
77 UCB • Boulder, Colorado 80309-0077 • www.colorado.edu/financialaid