



2022-2023

## Asset Information Worksheet

Student Financial Services • 1 Ferncroft Road • Danvers, MA 01923-0840

978-762-4189

[www.northshore.edu/paying/financial-services](http://www.northshore.edu/paying/financial-services)

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Required (please print)	ASSETS								
Student ID# <table border="1"><tr><td>N</td><td>0</td><td>0</td><td></td><td></td><td></td><td></td><td></td></tr></table>	N	0	0						<i>The Asset information you provided on the FAFSA (Free Application for Federal Student Aid) was incomplete or needs to be clarified. Please complete and return this form to the office. Net Worth means current value minus debt. Do not leave any section blank. If the amount is 0, please put "0" for the dollar amount.</i> <b>Amounts must be reported as of the date you initially submitted the FAFSA.</b>
N	0	0							
Last Name: _____									
First Name: _____									

### Student/Spouse Parent

Total balance of cash, savings, and checking accounts ..... \$ \_\_\_\_\_ \$ \_\_\_\_\_

Net Worth of Investments ..... \$ \_\_\_\_\_ \$ \_\_\_\_\_

Investments include real estate (do not include the home you live in), trust funds, rental property UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, precious metals, other securities, installment and land sale contracts (including mortgages held), commodities, etc. Also, include Coverdell savings accounts, 529 college savings plans, the refund value of 529 prepaid tuition plans. For a student who must report parental information, the accounts are reported as a parental investment. Do not include the value of life insurance, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) cash, savings, and checking accounts.

Net Worth of Business ..... \$ \_\_\_\_\_ \$ \_\_\_\_\_

Net worth of Business includes the market value of land, buildings, machinery, equipment, inventory, etc. Business debt means only those debts for which the business was used as collateral. 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.

Net Worth of Investment Farm ..... \$ \_\_\_\_\_ \$ \_\_\_\_\_

Net worth of Investment Farm includes the market value of land, buildings, machinery, equipment, inventory, etc. Investment farm debt means only those debts for which the investment farm was used as collateral. Do not include a farm that you live on and operate.

### Certification and Signatures

Each person signing below certifies that all the information reported is complete and correct. The student and parent whose information was reported on the FAFSA must sign and date.

**We cannot accept digital signatures.**

STUDENT'S SIGNATURE

DATE

PARENT'S SIGNATURE (Required for dependent student) / SPOUSE'S SIGNATURE (optional)

DATE

**WARNING:** If you purposely give false or misleading information on this form, you may be fined, sentenced to prison, or both.