



## 2023-2024 Asset Information Worksheet

Student Name: \_\_\_\_\_ Bear ID: \_\_\_\_\_

A comparison of federal income tax data and your 2023-2024 financial aid application has revealed some discrepancies or missing information concerning assets. Please complete the worksheet below. **Instructions for each item are found on the reverse side of this form.** Complete the Parent column if parental income is required/reported on your FAFSA.

| Asset  | Student | Parent(s) for dependent students |
|--|---------|----------------------------------|
| <b>Cash, Savings, Checking</b>   | \$      | \$                               |
| <b>Real Estate and Investments Value</b> (DO NOT INCLUDE A PRIMARY RESIDENCE IF IT IS A SINGLE FAMILY HOME)* | \$      | \$                               |
| <b>Real Estate and Investments debt</b> (RELATED ONLY TO ABOVE INVESTMENT/REAL ESTATE)                       | \$      | \$                               |
| <b>Business Value</b> (See Reverse Side)   | \$      | \$                               |
| <b>Business Debt</b>   | \$      | \$                               |
| <b>Investment Farm Value</b>   | \$      | \$                               |
| <b>Investment Farm Debt</b>  | \$      | \$                               |

\*If you rent any portion of your primary residence, the **portion that is rented** must be reported as "real estate;" include the value & debt associated with *the rental portion only*. See reverse side.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Date

### Return completed form to:

Financial Aid Office ~ Bridgewater State University  
45 Plymouth Street, Bridgewater, MA 02325 ~ (508) 531-1341 ~ Fax (508) 531-1728

## 2023-2024 Asset Worksheet Instructions

### **Cash, Savings and Checking:**

Include the current balance of checking and savings accounts and total amount of cash you currently have.

### **Real Estate/Investments Value:**

If you own real estate (other than your home) or have investments, write in how much they are worth today. You can estimate the fair market value (asking price if you were selling). Real estate includes rental property, land, summer/vacation homes, or a second home. *Include the value of portions of multifamily dwellings that are **not** the family's principal residence (if you live in a multifamily home and rent apartments, the apartments that are rented would be considered).* For instance, in a two-family apartment where one apartment is your residence and the other is rented, you would report 1/2 the value of the total property.

Investments include real estate, 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, precious and strategic metals, Coverdell savings accounts, 529 college savings plans, etc. **DO NOT INCLUDE** a primary single-family residence or the value of any retirement/pension account or value of an insurance policy.

### **Real Estate/Investment Debt:**

Write how much you owe on the real estate or investments referred to above. Again, for a two-family dwelling, report 1/2 the debt for the total property. **DO NOT INCLUDE** a mortgage on a primary single-family residence, personal or consumer loans, or any debts that are not related to the assets referred to above.

### **Business Value:**

If you own a business that employs at least 100 full-time employees, write in how much the business is worth today. Include the market value of land, buildings, machinery, equipment, inventories, etc. ***If you do not employ at least 100 full-time employees, you may write "zero".***

### **Business Debt:**

Write in what you owe on the business referred to above. Include only the present mortgage and related debts for which the business was used as collateral. **DO NOT INCLUDE** any debt that is not related to any other activity but those referred to above.

### **Investment Farm Value:**

If you own an investment farm, write in the value of the farm today. Include the market value of land, buildings, machinery, equipment, livestock, inventories, etc. **DO NOT INCLUDE** a family farm if it is your principal place of residence and you claimed on Schedule F of your 2020 Federal Tax Return that you "materially participated in the farm's operation."

### **Investment Farm Debt:**

Write in what you owe on the investment farm referred to above. Include the present mortgage and related debts for which the farm was used as collateral.