



**Office of Student Financial Services**

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**2023-2024 Student Asset Worksheet**

Student Name: \_\_\_\_\_ SMC ID# \_\_\_\_\_

Please provide the information requested below to verify your assets. **Report the value of assets as of the date the student's 2023-2024 FAFSA was submitted.** Do not leave any items blank. If any item does not apply, enter NA.

**1. CASH, SAVINGS, & CHECKING ACCOUNTS** (If this section does not apply, enter "0" or "NA" in the table below.)

Include cash, savings and checking account balances **as of the date you completed the FAFSA.**

Description of account	2021 Interest Earned	Balance As of FAFSA Filing Date

**2. INVESTMENTS** (If this section does not apply, enter "0" or "NA" in the table below.)

**Include:** Stocks, bonds, mutual funds, money market funds, certificates of deposit, trust funds, tax exempt funds, education savings accounts, etc.

**Do not include:** Life insurance, formal retirement accounts (401(k) plans, annuities, non-educational IRA's, KEOGH plans), UGMA/UTMA accounts for which you are the custodian but not the owner.

Description of investment	2021 Interest/Dividends	Value As of FAFSA Filing Date

**3. REAL ESTATE OTHER THAN PRIMARY RESIDENCE**  Not applicable – no real estate other than primary residence.

If applicable include rental properties, land, installment sales, vacation properties, seasonal camps, etc.

Property Description: \_\_\_\_\_

Street Address: \_\_\_\_\_

Current market/resale value \$ \_\_\_\_\_

Current amount of unpaid mortgage principal against this property \$ \_\_\_\_\_

Property Description: \_\_\_\_\_

Street Address: \_\_\_\_\_

Current market/resale value \$ \_\_\_\_\_

Current amount of unpaid mortgage principal against this property \$ \_\_\_\_\_

**\*\*CONTINUE TO PAGE 2\*\***

**4. BUSINESS AND/OR INVESTMENT FARM VALUE**

Not applicable: No business and no investment farm owned.

If applicable complete the items listed below:

**Include:** The market value of land, buildings, machinery, equipment, inventory, etc. and only those debts for which the business or investment farm was used as collateral.

**Do not include:** The value of a family farm or the value of a small business that you or your family own and control and that has 100 or fewer full-time/full-time equivalent employees.

Description \_\_\_\_\_

Current market/resale value of business/investment farm \$ \_\_\_\_\_

Amount of unpaid debt for business/investment farm \$ \_\_\_\_\_

**5. CERTIFICATION:** I certify that all the information reported on this form is true, complete and correct. I understand that any false statements could be cause for denial, reduction, withdrawal or repayment of financial aid.

Please print and sign before submitting. We CANNOT accept digital signatures.

**Student's Signature** \_\_\_\_\_

**Date** \_\_\_\_\_

**Spouse's Signature** \_\_\_\_\_

**Date** \_\_\_\_\_