Castleton

Return Completed Worksheet to:
Castleton University
Financial & Registration Services
62 Alumni Dr
Castleton, VT 05735
Or fax: (802) 468-6097, phone: (802) 468-6070

2017-2018 Student Asset Worksheet

Student Name: _____ **Student ID:** _____

See reverse side for additional information. If a category does not apply, please enter "0".

1.	Balance of cash, savings, and checking account(s)	$_____
2.	Fair market value of other real estate	$_____
3.	Debt against other real estate	$_____
4.	Current value of other investments	$_____
5.	Debt against other investments	$_____
6.	Fair market value of your Business/Investment Farm*	$_____
7.	Debt against Business/Investment Farm	$_____

**** Do not include the value/debt of the home you live in on this form.***

_____

_____

_____

_____

Certification

I certify that the information provided above is correct and complete to the best of my knowledge.

Student Signature: _____
Date: _____

Return completed form to:
Financial & Registration Services
Castleton University
62 Alumni Drive, Castleton, VT 05735

An asset is defined as property that has an exchange value. The purpose of collecting asset information is to determine whether your (and/or your spouse) family's assets are substantial enough to support a contribution toward your cost of attendance (COA). Only the net asset value (value minus debt against that asset) is counted in the need analysis.

Other Real Estate includes:

- Rental property (if you have rental property in a portion of your primary residence, you should only include the percentage of that rental property's fair market value).
- Land
- Summer home
- Second homes

Other Investments include:

- Trust funds
- Money market funds
- Certificates of deposit
- Installment and land sale contracts
- Stocks/bonds
- Coverdell savings accounts
- College savings plans

Note: Students who must report parental information should report all qualified educational benefits or education savings accounts owned by the parents. If the account is owned by a student who must report parental information, the value of the account is not to be reported. If the account is owned by a student (or the student's spouse) who is not reporting parental information, the value is to be reported as an investment.

Do not include the cash value or built-up equity of a life insurance policy or pension plan.

***Do not include** a farm you live on and operate. If you (or your spouse) are not the sole owner of the business, only report your share of its value/debt.

***Do not include** the value of a small business that you (your spouse and/or your parents) own and control and that has 100 or fewer full-time or full-time equivalent employees.

Business/investment farm fair market value includes:

- Land
- Buildings
- Equipment
- Machinery
- Vehicles
- Inventory

*Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral.