

Student Name \_\_\_\_\_

Banner ID + \_\_\_\_\_

Student Email \_\_\_\_\_@MiamiOH.edu

Daytime Phone #: \_\_\_\_\_

**STUDENT & SPOUSE (if applicable) ASSET INFORMATION**

Provide the amount as of the date the Free Application for Federal Student Aid (FAFSA) was filed.	If no value, enter \$0. DO NOT LEAVE BLANK
<b>Total balance of cash, savings, and checking accounts. Do not include student financial aid.</b>	\$ _____
<b>*Net worth of investments, including real estate. Do not include the home the student lives in.</b> <ul style="list-style-type: none"> <li>• <b>Do include</b> real estate (do not include the home the student lives in), rental property (including 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.</li> <li>• <b>Also include</b> qualified educational benefits or education savings accounts (e.g., Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans). These should be reported as:               <ul style="list-style-type: none"> <li>○ <b>Independent students:</b> Accounts owned by the student (and/or student's spouse) are reported as student investments.</li> <li>○ <b>Dependent Students:</b> Accounts owned by the student and all accounts owned by the parents for any member of the household are reported as parental investments.</li> </ul> </li> <li>• <b>Do not include</b> the home the student lives in, the value of life insurance, ABLE accounts, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.), or cash, savings, and checking accounts. Also do not include UGMA and UTMA accounts for which the student is the custodian, but not the owner.</li> </ul>	\$ _____
<b>*Net worth of businesses and/or investment farms. Do not include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.</b> <ul style="list-style-type: none"> <li>• <b>Do include</b> 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.</li> <li>• <b>Do not include</b> the value of a small business that the student's 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. For small business value, family includes (1) persons directly related to the student, such as a parent, sister, or cousin, or (2) persons who are or were related to the student by marriage, such as a spouse, stepparent, or sister-in-law. Investment farm value does not include the value of a family farm that the student, student's spouse and/or parent(s) live on and operate.</li> </ul>	\$ _____

*\*Net worth means the value of investments, businesses, and/or investment farms, minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use \$0 for investments or properties with a negative value.*

**CERTIFICATION:** I certify that all information reported to qualify for federal student aid is complete and correct, and that purposely giving false or misleading information may lead to fines, prison, or both.

 \_\_\_\_\_  
 Student Signature (Original, not typed)

 \_\_\_\_\_  
 Date

 \_\_\_\_\_  
 Parent Signature (Original, not typed)  
 (Required if student is dependent)

 \_\_\_\_\_  
 Date

**Please return this form to the One Stop:**

Miami University - One Stop - 301 S. Campus Ave. - Oxford, OH 45056 513-529-0001

Email: OneStop@MiamiOH.edu - Fax: 513-529-8713 - Web: MiamiOH.edu/OneStop

ASSETS2021