



WESTMINSTER
SALT LAKE CITY • UTAH

Office of Financial Aid • 1840 South 1300 East • Salt Lake City, UT 84105 • 801.832.2500

2008 – 2009 Asset Information Worksheet

Student Name: _____

ID# _____

In order for us to continue processing your financial aid application, you must complete the asset information below and return this signed worksheet to the Financial Aid Office. If you are a dependent student (born after January 1, 1985), please provide both student and parent information. If you are an independent student, please provide student and spouse (if married) information.

Asset Information	Student/Spouse	Parent(s)
Current balance of cash, savings, and checking accounts		
Net worth ¹ of your current investments ²		
Net worth of current businesses and/or investment farms. Do not include a farm that you live on and operate ³		

I certify that the information reported above is true and complete to the best of my knowledge. If asked, I agree to provide any supporting documentation required to verify that the amounts recorded above are accurate. I understand that if I purposely give any false or misleading information on this or any other form, I may be subject to a \$10,000 fine, a prison sentence, or both.

Student Signature

Date

Parent Signature (required for dependent students)

Date

¹**Net worth** is defined as current value minus debt. If net worth is one million or more, enter \$999,999. If net worth is negative, enter \$0.

²**Investments include** real estate (do not include the home you live in), trust funds, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, education IRAs, installment and land sale contracts (including mortgages held), commodities, etc. Investment value includes the market value of these investments as of today. Investment debt means only those debts that are related to the investments.

Investments do not include the home you live in, cash, savings, checking accounts, the value of life insurance and retirement plans (pension funds, annuities, non education IRAs, Keogh plans, etc.), or the value of prepaid tuition plans.

³**Business and/or investment farm value includes** 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. **Do not include** the value of a family farm that you (your spouse and/or your parents) live on and operate. **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.