



Current Assets Worksheet

- In order to continue processing your request for financial aid, our office needs additional information for the Verification process. Please complete this form and return it to our office as soon as possible.
- If there are any questions, please call our office at (808)544-0253.
- If any of the following do not apply to you, please mark "N/A".

1. What is your total current balance of **cash, savings and checking accounts** (as of the initial date of the current year's FAFSA):

\$ \$
(Student/Spouse) (Parents)

2. Current Net worth of **investments**:

\$ \$
(Student/Spouse) (Parents)

3. Current Net worth of **business/investment farm**:

\$ \$
(Student/Spouse) (Parents)

TERMS:

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

Investments include real estate (do not include the home you live in), trust funds, UGMA and UTMA accounts, 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 also include qualified education benefits or education savings accounts (e.g. Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans). For a student who does not report parental information, the accounts owned by the student (and/or the student's spouse) are reported as student investments. For a student who must report parental information, the accounts are reported as parental investments, including all accounts owned by the student and all accounts owned by the parents for any member of the household.

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

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 family farm or family business with 100 or fewer full-time equivalent employees.

Student's Name: _____

Student's SSN/ID: _____

Student's Signature: _____

Parent's Signature (if dependent): _____

Date: _____