MISSOURI S&T

**Student Financial Assistance**
G-1 Parker Hall, 300 W. 13th Street
Rolla, MO 65409
P: 573/341-4282 F: 573/341-4274

## 2022-2023 Financial Aid Year
## Dependent Student Assets

When you completed your 2022-2023 FAFSA, you were not required to provide information about your and your parents' cash, savings, and investments. Because you were selected for verification, we are now required to collect this information. Please complete the questions below with information ***as of the day you first completed the 2022-2023 FAFSA***.

| | You (Student) | Your Parent(s) |
|---|---|---|
| What is your and your parents' total balance of cash, savings, and checking accounts as of the date you completed the FAFSA? | $ | $ |
| What is the net worth of your and your parents' investments, including real estate as of the date you completed the FAFSA? *See below for qualifying investments*. | $ | $ |
| What is the net worth of your and your parents' current businesses and/or investment farms as of the date you completed the FAFSA? | $ | $ |

Net worth means the current value, as of today, 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. Investment value means the balance or market value of these investments as of the day you signed your FAFSA. Investment debt means only those debts that are related to the investments.

**Investments include** real estate (do not include the home in which you live), rental property (includes 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.

**Investments also include** 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 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, retirement plans [401(k) plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.], or cash, savings and checking accounts already reported in Question 1 above. Investments also do not include UGMA and UTMA accounts for which you are the custodian, but not the owner.

**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.

**Business value does not include** the value of a small business if your 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, your family includes (1) persons directly related to you, such as a parent, sister or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law.

**Investment farm value does not include** the value of a family farm that you (your spouse and/or your parents) live on and operate.

**Please sign and date this form and return to our office**. This form must be signed by hand or with stylus. Digital or typed signatures will be returned. If you purposely give false or misleading information, you may be fined, sent to prison, or both.

I certify all information reported is complete and correct.

Student Signature _____ Date _____

Parent Signature _____ Date _____

Student Name (Printed) _____

Missouri S&T Student ID Number _____