



Office of Financial Aid, 62 Alumni Drive  
Castleton, VT 05735  
802.468.6070  
Fax 802.468.5237

## Student Asset Worksheet - Castleton State College

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 ..... \$ \_\_\_\_\_

**Please explain the change in the amount of assets reported last year (07-08) and what was reported on the FAFSA this year (08-09). Do not include the value/debt of the home you live in on this form.**

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### 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 Aid/Student Services Office  
Castleton State College  
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.

01/10/08