



Office of Financial Aid Services

183 Strand Union
P.O. Box 174160
Bozeman, MT 59717-4160
www.montana.edu/wwwfa

Tel (406) 994-2845
Fax (406) 994-6962

Dear Student,

RE: DEPENDENT STUDENT FAFSA ASSET INFORMATION

The asset information was left blank on your FAFSA. Please be advised that to complete your Institutional Verification requirements, you will need to provide the following asset information (valued as of the day you signed the FAFSA). Please complete this form and return to Financial Aid Services as soon as possible so we can finish the verification process and allow aid to pay into your account. (Do not leave any items blank. Mark a zero if you have nothing to report.)

Student Name: _____ **MSU ID:** _____
(Please print)

¹**Cash, Checking, Savings:** \$ _____

²**Investment Net Worth:** \$ _____

³**Business & Farm Net Worth:** \$ _____

Student's Signature: _____ **Date:** _____

¹ **Total cash on hand, savings and checking account balances.**
Do not include student financial aid.

² **Investment Net Worth = Investment Current Market Value - Investment Debt.**
Investments include real estate such as rental property, land, and second or summer homes. Do not include your family's primary residence even if it is part of a business. Include the value of portions of multifamily dwellings that you own, except that you must exclude the portion of the value of a dwelling that is your family's principal residence. Investments also include trust funds, Uniform Transfers to Minors Act (UTMA)/Uniform Gifts to Minors Act (UGMA) Custodial Accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, all qualified educational benefits or education savings accounts including Coverdell savings accounts, 529 college savings plans, the refund value of 529 prepaid tuition plans, installment and land sale contracts (including mortgages held), commodities, etc. that are in your name Do not include the value of life insurance and retirement plans (pension funds, annuities, non-Education IRAs, Keogh plans, etc.). Do not report any accounts owned by your parents.

³ **Business & Farm Net Worth = Business & Farm Current Market Value – Business & Farm Debt.**
Business or farm value includes the current market value of land, buildings, machinery, equipment, inventory, etc. Do not include the family's primary residence. Do not include the net worth of a family owned and controlled small business, which can include family farms, that have 100 or fewer full-time or full-time equivalent employees.

You may visit www.FAFSA.ed.gov to obtain further information.

Thank you for your prompt attention to this matter.

**Financial Aid Services
The Verification Team**

**Office of Financial Aid Services**

183 Strand Union
P.O. Box 174160
Bozeman, MT 59717-4160
www.montana.edu/wwwfa

Tel (406) 994-2845
Fax (406) 994-6962

Dear Parent(s),

RE: PARENT(S)' FAFSA ASSET INFORMATION

The parent(s)' asset information was left blank on your student's FAFSA. Please be advised that to complete your student's Institutional Verification requirements, you will need to provide the following asset information (valued as of the day you signed the FAFSA). Please complete this form and return to Financial Aid Services as soon as possible so we can finish the verification process and allow aid to pay into your student's account. (Do not leave any items blank. Mark a zero if you have none to report.)

Student Name: _____ **MSU ID:** _____
(Please print)

¹**Cash, Checking, Savings:** \$ _____

²**Investment Net Worth:** \$ _____

³**Business & Farm Net Worth:** \$ _____

Parent(s) Signature: _____ **Date:** _____

¹ **Total cash on hand, savings and checking account balances.**
Do not include student financial aid.

² **Investment Net Worth = Investment Current Market Value Less Investment Debt.**
Investments include real estate such as rental property, land, and second or summer homes. Do not include the family's principal place of residence, even if it is part of a business. Include the value of portions of multifamily dwellings that you own, except that you must exclude the portion of the value of a dwelling that is the family's principal residence. Investments also include trust funds, Uniform Transfers to Minors Act (UTMA)/Uniform Gifts to Minors Act (UGMA) Custodial Accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, all qualified educational benefits or education savings accounts including Coverdell savings accounts owned by your parents, 529 college savings plans, the refund value of 529 prepaid tuition plans, installment and land sale contracts (including mortgages held), commodities, etc. Do not include the value of life insurance and retirement plans (pension funds, annuities, non-Education IRAs, Keogh plans, etc.). Do not report any accounts owned by the dependent student.

³ **Business & Farm Net Worth = Business & Farm Current Market Value Less Business & Farm Debt.**
Business or farm value includes the current market value of land, buildings, machinery, equipment, inventory, etc. Do not include the family's primary residence. Do not include the net worth of a family owned and controlled small business, which can include family farms, that have 100 or fewer full-time or full-time equivalent employees.

You may visit www.FAFSA.ed.gov to obtain further information.

Thank you for your prompt attention to this matter.

**Financial Aid Services
The Verification Team**