UCF Stands For Opportunity

Academic Year 2016-2017
Office of Student Financial Assistance

STUDENT/SPOUSE ASSET WORKSHEET

INDEPENDENT

Student's Name:_____ UCF ID: _____

Address:_____ Date: _____

City:_____ State/Zip:_____

Spouse's Name:_____ Phone:_____

Complete every question in this worksheet to report the value and debt of assets **as of the day you first completed the FAFSA**. Do not leave any answer blank. **If the tax return indicates the existence of an asset such as interest, dividends, capital gains, rental real estate, partnerships, and S corporations, and you report a $0 value, please provide a written explanation below.**

	VALUE	DEBT
CASH, SAVINGS, AND CHECKING ACCOUNTS:……..	$_____	
REAL ESTATE:…… (Ex: land, rental property, second and summer homes. DO NOT INCLUDE THE HOME YOU LIVE IN.)	$_____	$_____
Was rental property sold/ foreclosed?.....	○ Yes / ○ No	When?_____
Was the rental property(s) listed on your or your spouse's Schedule E?.....	○ Yes / ○ No	
Address of rental property→→→→→→→→→→→→→→→→→→→→→→→→	_____	
INVESTMENTS:…… (Ex: Qualified tuition plans such as Florida prepaid and 529s, CDs, trusts, mutual funds, stocks, bonds, Education IRAs, S corporations, partnerships, etc.)	$_____	XXXXXX
BUSINESS:…… (Ex: land, buildings, inventories, equipment, machinery, etc. Note: Do not report small businesses that you or your spouse own and control that has 100 or fewer full time or full time equivalent employees.)	$_____	$_____
FARM INVESTMENT:…… (Ex: livestock, machinery, land, buildings, equipment, etc.)	$_____	$_____

Does the family live on a farm? ○ Yes ○ No

Explanation:

_____ _____

Student's Signature Date Spouse's Signature Date

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