

Printed Name: *last* _____ *first* _____ *m.i.* _____

Social Security #: _____ Palomar ID #: _____

PALOMAR COLLEGE FINANCIAL AID 2009-2010 ASSET INFORMATION WORKSHEET

For office use only

When you completed your 2009-2010 financial aid application (FAFSA), you either left the asset section blank when you were required to fill it out or you reported inconsistent information. Please complete the following section(s) indicated in your financial aid requirements checklist, attach any relevant documentation and return the form to the Financial Aid Office. Note: if you are providing parent information, the form must include a parent signature.

CASH, SAVINGS AND CHECKING ACCOUNT

Include the balance as was true on the **date you filed your aid application.**

Student/Spouse: VALUE \$ _____

Parent(s): VALUE \$ _____

NET WORTH OF INVESTMENTS (Investment value minus Investment debt)

Investments include real estate (*other than your home*), trust funds, money market funds, mutual funds, certificates of deposit, stocks, bonds, other securities, installment and land sale contracts (including mortgages held, commodities, etc. Investment value includes the market value of these investments. **Do not include the value of life insurance and retirement plans (pension funds, annuities, IRA'S, Keogh plans, etc.) or the value of prepaid tuition plans.**

Investment debt means only those debts that are related to the investments.

Report the amount as was true on the **date you filed your aid application.**

Student/Spouse: NET WORTH \$ _____

Parent(s): NET WORTH \$ _____

NET WORTH OF BUSINESS (Business value minus business debt)

Business value includes the market value of land, buildings, machinery, equipment, and inventory.

Business debt means **only those debts for which the business was used as collateral.**

Report the amount as was true on the **date you filed your aid application.**

Student/Spouse: NET WORTH \$ _____

Parent(s): NET WORTH \$ _____

NET WORTH OF INVESTMENT FARM (**Do not include a farm that you live on and operate.**)

Report the amount as was true on the **date you filed your aid application.**

Student/Spouse: NET WORTH \$ _____

Parent(s): NET WORTH \$ _____

Comments: _____

Student Signature _____ Parent Signature _____

(dependent students only)