



Investments include

(round to the nearest dollar and please don't include commas or decimal points)

- Certificates of Deposit
- Stocks
- Stock Options
- Trust Funds
- *Uniform Gifts to Minors Act (UGMA)* and *Uniform Transfers to Minors Act (UTMA)* accounts
- Money Market Funds
- Mutual Funds
- Bonds
- Other Securities
- Installment and Land Sale Contracts (including mortgages held)
- Commodities
- Qualified Educational Benefits or Education Savings Accounts such as Coverdell Savings Accounts, 529 College Savings Plans, and the Refund Value of 529 Prepaid Tuition Plans

Note: UGMA and UTMA accounts are considered assets of the student and must be reported as an asset of the student on the FAFSA form, regardless of the student's dependency status. Don't include UGMA and UTMA accounts for which you're the custodian but not the owner.

If you **aren't** required to report parental information and you own (or if married, your spouse owns) any of these qualified educational benefit plans **report the current balance of the plan as a student/spouse asset**. The amount to be reported for a prepaid tuition plan is the "refund value" of the plan.

Investment value means the current balance or market value of these investments as today. Investment debt means only those debts that are related to the investments.

Investments don't include the home in which you (and if married, your spouse) live; cash, savings and checking accounts; ABLE accounts; or the value of life insurance and retirement plans (401[k] plans, pension funds, annuities, noneducation IRAs, Keogh plans, etc.).