

\_\_\_\_\_  
Last Name

\_\_\_\_\_  
First Name

\_\_\_\_\_  
M.I.

\_\_\_\_\_  
UTC ID

## UTC Financial Aid Office 2009-2010 ASSETS WORKSHEET

Please complete this form, including all necessary signatures and return it to: **UTC Financial Aid/Dept 4805, 615 McCallie Avenue, Chattanooga, TN 37403-2598 or by FAX 423-425-2292.** If you need help, you may visit our office in Hooper Hall, Room 101, contact us at 423 425-4677, or via email at <http://www.utc.edu/Administration/FinancialAid/>. Do not leave any items blank. Incomplete and/or improperly signed forms **will delay completion of file and awarding.**

.....  
The following questions on your FAFSA (Free Application for Federal Student Aid) were not completed. The answers to these questions are required before your eligibility for federal financial aid may be determined.

### **A. TERMS TO KNOW**

**Net worth** means current value minus debt. If net worth is negative, enter zero.

**Investments** include real estate (do **not** include the home you live in), rental property, trust funds, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, college savings plans, installment and land sale contracts (including mortgages held), commodities, etc.

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

**Investment farm** includes any farm that you do not live on and operate.

**Business** – Do **not** include 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 and/or investment farm value** includes the market value of land, buildings, machinery, equipment, and inventory, etc.

**Business and/or investment farm debt** means only those debts for which the business or investment farm was used as collateral.

**All information should be reported as of the day you *completed* and *signed* the FAFSA.**

### **B. CASH, SAVINGS, CHECKING BALANCES**

Student Cash, Savings, Checking      \$ \_\_\_\_\_

Parent Cash, Savings, Checking      \$ \_\_\_\_\_

### **C. NET WORTH OF INVESTMENTS**

Student Investment Value      \$ \_\_\_\_\_

Parent Investment Value      \$ \_\_\_\_\_

### **D. NET WORTH OF BUSINESS AND/OR FARM**

Student Business and/or Farm Value      \$ \_\_\_\_\_

Parent Business and/or Farm Value      \$ \_\_\_\_\_

By signing this form you agree, if asked, to provide information that will verify the accuracy of the form.

\_\_\_\_\_  
Student Signature      Date

\_\_\_\_\_  
Parent Signature (if dependent)      Date

**PLEASE MAKE SURE THE STUDENT'S NAME AND UTC ID ARE ON ALL DOCUMENTS**