



Financial Aid Offices
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Student Asset Verification Worksheet 2026-2027 Academic Year

Student's Name _____

MassBay ID # _____

Further information is required before we can process your request for financial aid. For all questions, **use figures as of the date you completed the Free Application for Federal Student Aid (FAFSA).** Do not leave any items blank.

Investments include: real estate (do not include the value of the home you live in), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc. Investments also include qualified educational benefits or education savings accounts (e.g. Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans) owned by you (and/or your spouse).

- 1) What was the total value of your (and your spouse's) cash, savings and checking account(s)? \$ _____
- 2) Trusts \$ _____
- 3) Investments, including Stocks, Bonds, etc. (Do not include retirement savings such as pension plans, 401K, 403B, etc.)
\$ _____
- 4) Educational Savings Plan \$ _____
- 5) Prepaid Tuition Plan \$ _____
- 6) Annual Child Support (include total amount received in the last calendar year) \$ _____

7) **What was the net worth (value minus debt) of your (and your spouse's) investments?** *(Please see details below)*
Do you (and/or your spouse) own real estate or rent out a part of your primary home? (Don't include the home in which you live) YES NO

If you answered "YES," please answer the questions below. If you answered "NO," skip to **Question 8**.

- What is the address of the property? _____
- What is the total number of units in the property, including the unit in which you live? _____
- What was the market value of the property? \$ _____
- What was the amount owed on this property? \$ _____

If you own more than one investment property, please answer the above questions for the additional properties on a separate sheet.

8) **What was the net worth of your (and spouse's) current business and/or investment farms?** *(Please see details below)*
Do you (and/or your spouse) own a business/farm? Answer "NO" if you are a sole proprietor of your business/farm or have 100 or fewer full-time employees and own no other businesses/farm? YES NO

If you answered "YES," please answer the questions below. If you answered "NO," skip to **Student's Signature**.

- What percentage of the business/farm is family owned and controlled? _____ %
- What was the total value of the business/farm? \$ _____
 *Value includes the market value of land, buildings, machinery, equipment, inventory, etc.
- What was the total debt * of the business/farm? \$ _____
 *Include only debts for which the business was used as collateral.

Statement of Certification: My signature certifies that the information provided above is true. I agree to provide proof of the information if requested.

Student's Signature: _____

Date: _____

Please note: By using a typable format to sign your name electronically using this form, you are agreeing that your electronic signature is the legal equivalent of your manual signature on this form.