

FORM SASSET - IDAHO STATE UNIVERSITY
VERIFICATION OF ASSETS
STUDENT/SPOUSE

26-27

SASSET-27

The federal government requires colleges to check the accuracy of the information you provided on your Free Application for Federal Student Aid (FAFSA). This process is called verification. You must complete the verification process before the ISU Office of Financial Aid can establish your eligibility for financial assistance. You must return the information requested on this form or you will not be considered for federal financial aid. Please return this completed form to:

Office of Financial Aid, Idaho State University
921 S 8th Ave, Stop 8077, Pocatello, ID 83209-8077
Phone: (208)282-2756 Fax: (208)282-4755

University Place, Bennion Student Union
1784 Science Center, Idaho Falls, ID 83402
Phone: (208)282-7704

Email: financialaid@isu.edu

Scan & Upload: isu.edu/financialaid/upload

*Student Name: _____
(Use blue or black ink) Last First M.I.

*ISU ID: _____ *Last 4 Digits of Social Security #: _____
(Find on [MyISU](#)) *Required

INSTRUCTIONS: If you are divorced or separated and you with your spouse have jointly owned assets, give only your portion of the assets and debts. If you (and your spouse) have assets owned jointly with someone else, give only your (and your spouse's) portion of the assets and debts. Be sure to give information about assets held in trust for you (and your spouse). **Don't leave any questions blank. If a question doesn't apply, write in "0".**
The figures reported on this form should represent the value(s) as of the date FAFSA was filed.

***STUDENT (and spouse) INFORMATION:**

*Cash, savings, and checking accounts: \$ _____
(Include balance of checking / savings accounts as of the date FAFSA was filed. Do not include student financial aid, retirement accounts, or investments)

*Investments, including real estate: Value \$ _____ Debt \$ _____
(Include real estate [do not include 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, Coverdell savings accounts, 529 college savings plans, refund value of 529 prepaid tuition plans, installment and land sale contracts including mortgages held, commodities, etc. Investment value means value of investments as of the date FAFSA was filed. Investment debt means only those debts related to investments.)

(Investments DO NOT include: home you live in, the value of life insurance, ABLE accounts, retirement plans (401[k] plans, pension funds, annuities, non-educational IRA's, Keogh plans, etc.), or cash, saving, and checking accounts already reported.)

(Note: Money in an Education IRA is an asset for the student beneficiary because an Education IRA is not a retirement account. It is essentially a savings account to be used for student's educational expenses. Therefore, you must report the amount in your Educational IRA - including Coverdell savings accounts, 529 college savings plans, and the refund value of 529 prepaid tuition plans.)

*Businesses and/or Farms Value \$ _____ Debt \$ _____
(Businesses and farms include businesses (including small or family-run businesses) owned by you that have more than 100 fulltime (or full-time equivalent) employees, along with the fair market value of real estate owned by the business. They also include income producing farms that you own, including the fair market value of land, buildings, livestock, unharvested crops, and machinery actively used in farming, agricultural, or commercial activities. Report values as of the date FAFSA was filed.)

CERTIFICATION: The person signing below certifies that all of the information reported is complete and correct.

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

Student Signature: _____ Date: _____
Typed signatures not accepted