



# 2024-2025 Statement of Assets Worksheet

Student Financial Assistance  
 8600 University Boulevard  
 Evansville, IN 47712  
 Phone: 812-464-1767 or 800-467-1965  
 Fax: 812-461-5305 / Email: finaid@usi.edu

This form is used to verify potential conflicting data reported on your 2024-2025 FAFSA or to clear up FAFSA rejects due to missing asset information.  
**Incomplete forms will not be processed!**

## A. Student Information

Last Name	First Name	M.I.	USI Student ID number (SSN if ID is unknown)
Phone Number (include area code)			Date of Birth

## B. Asset Information

Do NOT leave fields blank. If the answer is zero (0), please enter zero (0).

#	Asset Information as of _____ <b>Enter the day that your 2024-2025 FAFSA was initially completed.</b>	Student/Spouse Amount	Parent(s) Amount
1	<b>What was the total balance of cash, savings, and checking accounts?</b> Don't include student financial aid.		
2	<b>What was the net worth of your investments, including real estate (not your home)?</b> Net worth means current value minus debt. Investments include real estate, rental property, 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. Don't include the home you live in, the value of life insurance, retirement plans (pension funds, annuities, noneducation IRAs, Keogh plans, etc), and prepaid tuition plans. If the student is required to report parent information on the FAFSA form, parents should not report the value of education savings accounts for other children. Qualified education benefits or education savings accounts must be reported as an asset of the parent if the student is required to report parent information. If the student is not required to report parent information on the FAFSA form, the education benefit or savings account is reported as an asset of the student. UGMA and UTMA accounts are considered the assets of the student and must be reported as an asset of the student on the FAFSA		
3	<b>What was the net worth of your businesses and/or investment farms?</b> Do not include a farm that you live on and operate. Net worth means current value minus debt. Business and/or investment farm value includes the market value of land, buildings, machinery, equipment, inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral.		
#	Child Support Information for _____ <b>Enter the Last Completed Calendar Year Prior to Filing FAFSA</b>	Student/Spouse Amount	Parent(s) Amount
4	Enter total amount <b>received</b> in child support for the last complete calendar year for all children reported in family size on FAFSA.		

## C. Certification and Signature(s)

**Typed/Electronic signatures are NOT accepted**

Each 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, sentenced to jail, or both.

Student Signature (Required)	Date	Parent Signature *	Date
(Required if the student is dependent according to FAFSA)			