

Asset Value Worksheet

(Student Name)

(NU ID)

You and/or your parents are required to complete the asset value information below to finalize the verification of your current financial information.

Net worth = the current value minus debt

- **Investments include** real estate (do not include the home in which you live), 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, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities; qualified educational benefits or education 529 savings accounts.
- **Investments do not include** the home you live in, the value of life insurance, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings and checking accounts
- **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.
- **Business value does not include** the value of a small business if your family owns and controls more than 50 percent of the business and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, your family includes (1) persons directly related to you, such as a parent, sister or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law.
- **Investment farm value does not include** the value of a family farm that you (your spouse and/or your parents) live on and operate.

Net Worth Values	Student Values	Parent Values
Investment Values		
Business Values		
Investment Farm Values		
Value of cash, savings, checking accounts		

I certify the above values are true as of the completion date of this form:

(Student Signature and Date)

(Parent Signature and Date)

SUBMIT FORM TO ONE OF THE FOLLOWING:
 EMAIL/SCAN: finaid@unmc.edu
 FAX: 402-559-6796
 984265 NEBRASKA MEDICAL CENTER
 OMAHA, NE 68198