



Office of Financial Aid • 100 East 8<sup>th</sup> Street • PO Box 9000 • Holland, MI 49422-9000  
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We are reviewing your 2023-24 financial aid application and need clarification of your assets. Please provide the following information, noting the market value as of the date the FAFSA was filed. **If the response is "none", enter a zero under 'DOLLAR VALUE'.**

**Student Name:** \_\_\_\_\_

**Hope College ID Number:** \_\_\_\_\_

EXCLUDE the value of the home in which you live and the value of life insurance or retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc).

### STUDENT'S GENERAL ASSET INFORMATION

### DOLLAR VALUE

Cash, savings, and checking accounts: \$ \_\_\_\_\_

Trust funds: + \_\_\_\_\_

Stocks, stock options, bonds, other securities, and mutual funds: + \_\_\_\_\_

Money market funds: + \_\_\_\_\_

Certificates of deposit: + \_\_\_\_\_

Commodities: + \_\_\_\_\_

Coverdell Savings Accounts: + \_\_\_\_\_

529 College Savings Plans: + \_\_\_\_\_

UGMA and/or UTMA Account: + \_\_\_\_\_

Refund value of 529 State Prepaid Tuition plans (If owned by student – INDEPENDENT Students only) + \_\_\_\_\_

Net value of installment & land sale contracts (including mortgages held): + \_\_\_\_\_

“Other real estate”, including rental property, land, second homes, etc.:  
(market value minus debt – do not include the home you live in) + \_\_\_\_\_

**Other investments** including personal investment in a business or partnership

Type: \_\_\_\_\_ + \_\_\_\_\_

Type: \_\_\_\_\_ + \_\_\_\_\_

**TOTAL:** \$ \_\_\_\_\_

### **STUDENT'S BUSINESS ASSET INFORMATION (Leave blank if not applicable.)**

***If you own more than one business, complete a separate form for each.***

Is the business more than 50% family-owned and controlled?  YES  NO

Does the business have 100 or fewer full-time equivalent employees?  YES  NO

1. What is the business worth today? (market value of land, buildings, machinery, equipment, inventory, etc.) \$ \_\_\_\_\_

2. What is the business-related debt today? (include only those debts for which the business was used as collateral) \$ \_\_\_\_\_

### **STUDENT'S INVESTMENT FARM ASSET INFORMATION (Leave blank if not applicable.)**

Is the farm your principal place of residence, and did you claim on Schedule F of your 2021 federal tax return that you “materially participated in the farm's operation”?  YES  NO

If No:

1. What is the farm worth today? (market value of land, buildings, machinery, equipment, inventory, etc.) \$ \_\_\_\_\_

2. What is the farm-related debt today? (include only those debts for which the farm was used as collateral) \$ \_\_\_\_\_

**Student Signature:** \_\_\_\_\_

**Date Signed:** \_\_\_\_\_

(Signature must be in ink.)