



## Student Asset Information 2026-2027 Academic Year

Student Name: \_\_\_\_\_ Student ID: \_\_\_\_\_

E-Mail: \_\_\_\_\_ Phone #: \_\_\_\_\_

In order to process your financial aid we need the following information. Please do not leave blanks, enter "0" if not applicable. For further instructions on these questions, please see the back of form.

**\*Net worth means current value minus debt.** If net worth is negative, enter 0.

**Student:** Include spouse if you are married

1. As of today, what is the net worth of you (and your spouse's) total current balance of cash, savings and/or checking accounts?

\$\_\_\_\_\_ \* **Do not include** student financial aid.

2. As of today, what is the net worth of you (and your spouse's) investments, including real estate?

\$\_\_\_\_\_ \* Do not include the home you live in.

3. As of today, what is the net worth of you (and your spouse's) current business and/or investment farms?

\$\_\_\_\_\_ \* Enter the net worth of your businesses or for-profit agricultural operations.

**(see back page for further instructions on businesses or investment farms.)**

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Student Signature

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Spouse Signature

Helena College Financial Aid Office | 1115 North Roberts Street, Helena, MT 59601  
(406) 447-6916 | FinancialAid@HelenaCollege.edu

## Asset Questions – Additional Information

- **Net worth means** current value minus debt. If net worth is negative, enter 0.
- **Investments include** real estate (do not include the home you live in), 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 refund value of 529 prepaid tuition plans). For a student who does not report parental information, the accounts owned by the student (and/or the student's spouse) are reported as student investments. For a student who must report parental information, the accounts are reported as parental investments below, including all accounts owned by the student and all the accounts owned by the parents for any member of the household.
- **Investments do not include** the home you live in, the value of life insurance, retirement plans (401 [k] plans, pensions funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings, and checking accounts already reported above or below.
- **Investments also do not include** UGMA and UTMA accounts for which you are the custodian, but not the owner. Investment value means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments.
- **Business and/or investment farms Include** businesses that you own (including a small or family-run business) or income-producing farms that you own (including the fair market value of land, buildings, livestock, unharvested crops, and machinery actively used in investment farms, agricultural, or commercial activities). Businesses and investment farms do not include the value of crops that are grown solely for consumption by the student and their family or the home in which you live. If the home in which you live is also located on a farm that you own, do not include the net value of that principle residence in the net value of all farm assets. The principal residence may include the home, structures, and land that are adjacent to the home that are not being used, stored, or sold for farming or other commercial activities.