

Include the current balance of checking and savings accounts and total amount of cash you currently have.

If you own real estate (other than your home) or have investments, write in how much they are worth today. You can estimate the fair market value (asking price if you were selling). Real estate includes rental property, land, summer/vacation homes, or a second home. *Include the value of portions of multifamily dwellings that are the family's principal residence (if you live in a multifamily home and rent apartments, the apartments that are rented would be considered).* For instance, in a two-family apartment where one apartment is your residence and the other is rented, you would report ½ the value of the total property.

Investments include real estate, 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, precious and strategic metals, etc.
a primary single-family residence or the value of any retirement/pension account or value of an insurance policy.

Write how much you owe on the real estate or investments referred to above. Again, for a two-family dwelling, report ½ the debt for the total property.
a mortgage on a primary single-family residence, personal or consumer loans, or any debts that are not related to the assets referred to above.

If you own a business, write in how much the business is worth today. Include the market value of land, buildings, machinery, equipment, inventories, etc

Write in what you owe on the business referred to above. Include only the present mortgage and related debts for which the business was used as collateral.
any debt that is not related to any other activity but those referred to above.

If you own an investment or family farm, write in the value of the farm today. Include the market value of land, buildings, machinery, equipment, livestock, inventories, etc.
a family home if it is your primary place of residence located on that farm.

Write in what you owe on the farm referred to above. Include the present mortgage and related debts for which the farm was used as collateral. Do not include any debt for a primary place of residence – your home.

Record the amount of child support received in 2022 for all dependent children in the family size.

Record the value of your 529, Coverdale, or other educational savings plan (under PARENT ASSETS) for the student who is the financial aid applicant.

Return this form to:

Financial Aid Office ~ Bridgewater State University
45 Plymouth Street, Bridgewater, MA 02325 ~ (508) 531-1341 ~ Fax (508) 531-1728