

For Office Use Only	
Checklist Item	9ASS27
COMMKEY	9ASSWK

Asset Worksheet 2026-2027

Last Name	First Name	MI	Stony Brook ID #
Address (include apt. #)	City	State	Zip Code

Asset Information: *Do not leave blank spaces or form will not be processed; if the answer is zero place a \$0 on the line*

	Student	Parent(s)
1. As of the date you signed your 2026-2027 FAFSA, what was the total current balance in cash and of all savings and checking accounts?	\$ _____	\$ _____
2. As of the date you signed your 2026-2027 FAFSA, what was the net worth of investments? (Do not include real estate). Net worth means current value minus debt.	\$ _____	\$ _____
Examples of investments to be included: <ul style="list-style-type: none"> <li style="width: 33%;"><ul style="list-style-type: none">• Stock options/ Stocks• UGMA & UTMA accounts• Mutual Funds• Coverdell savings accounts• Commodities, etc. <li style="width: 33%;"><ul style="list-style-type: none">• Trust Funds• Money Market Funds• Certificate of Deposit• 529 College Savings Plans• Bonds <li style="width: 33%;"><ul style="list-style-type: none">• Refund value of 529 prepaid tuition plans• Other securities• Installments and land sale contracts (including mortgages held) 		
3. Real Estate Investments:		
a. Is the home that your family owns and resides in a multifamily dwelling? (e.g., a unit within a family home that has its own entrance, kitchen, and bath rented to someone)	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If you answered YES to part 3a, please answer the following questions: What is the current market value of the property if sold today? \$ _____ What is the mortgage balance owed on the property? \$ _____ Number of family units in the property? _____		
b. Do you or your parent(s) own real estate other than your primary residence (may be listed on schedule E of 1040 tax form)?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If you answered YES to part 3b, please answer the following questions: Address of the rental property or properties: _____ What is the total current market value of the property/properties if sold today? \$ _____ What is the total mortgage balance/s owed on the property/properties? \$ _____		
4. Do you or your parents own a business or investment farms?	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
5. If you answered YES to number 4, please answer the following questions:		
What type of business/farm? _____		
As of the date you signed your FAFSA, what was the net worth of your current businesses and/or investment farms**?	\$ _____	\$ _____
** Include the market value of land, buildings, machinery, equipment, inventory, etc... minus the debt the business or investment farm was used as collateral. Do not include the value of crops grown solely for consumption by you and your family.		

Signatures Required: Electronic signatures are not acceptable, physically sign before uploading or submitting

By signing this worksheet we certify that all of the information reported is complete and correct. Warning: If you purposely give false or misleading information you may be fined \$20,000, sent to prison, or both.

STUDENT SIGNATURE (REQUIRED)	DATE
PARENT SIGNATURE (REQUIRED FOR DEPENDENT STUDENT)	DATE

All student and parent (for dependent students) asset information is required to complete the review of your 2026-2027 financial aid. **Answer all questions as of the date you filed your 2026-2027 FAFSA.** Do not leave any blank answers; if the amount is zero indicate with \$0. Federal Financial Aid will not be processed or disbursed until all required information is received and reviewed.

You must physically sign this form as electronic signatures are not acceptable.

For secure and faster processing, submit this form via the [Upload Process](#) located in your SOLAR To Do List.

Need help scanning your document? Check out our [Scanning Documents Using Your Smartphone guide](#).

Note: Only .tif and/or .pdf file types are allowed for uploading.

Alternatively, mail or fax all documents to The Financial Aid & Scholarships Office below.
Be sure to include the student's name and **Stony Brook ID** on all correspondence.

Office of Financial Aid and Scholarship Services
Stony Brook Union, Suite 208
Stony Brook, NY 11794-3252
Telephone: 631-632-6840
Fax: 631-632-9525