

2026-2027 ASSET FORM

 STUDENT NAME

 UMASS GLOBAL ID NUMBER

After evaluating the information on your FAFSA, additional information is needed to complete your application.

DO NOT LEAVE ANY LINE BLANK. USE ZEROS IF NO VALUE or N/A IF NOT APPLICABLE

ASSET VALUE (AS OF FAFSA FILING DATE):

	STUDENT & SPOUSE	PARENT - IF YOU ARE A DEPENDENT STUDENT
CASH, SAVINGS AND CHECKING	\$	\$
CHILD SUPPORT RECEIVED IN 2024	\$	\$

INVESTMENT VALUE

	STUDENT & SPOUSE	PARENT - IF YOU ARE A DEPENDENT STUDENT
REAL ESTATE (DO NOT INCLUDE THE HOME YOU LIVE IN)	\$	\$
CDs, STOCKS, TRUST FUNDS, BONDS, UGMA AND UTMA ACCOUNTS, SECURITIES, MUTUAL FUNDS, COMMODITIES	\$	\$
529 COLLEGE SAVINGS PLANS, COVERDELL SAVINGS ACCOUNTS, INSTALLMENT AND LAND SALE CONTRACTS	\$	\$
OTHER INVESTMENTS (DO NOT INCLUDE LIFE INSURANCE, PENSIONS, ANNUITIES, NON-EDUCATION IRA, KEOGH PLAN, 401K, 403B)	\$	\$
INVESTMENT VALUE TOTAL	\$	\$

BUSINESS VALUE (AS OF FAFSA FILING DATE):

	STUDENT & SPOUSE	PARENT - IF YOU ARE A DEPENDENT STUDENT
BUSINESS NET WORTH (VALUE MINUS DEBT)	\$	\$
INVESTMENT FARM NET WORTH (VALUE MINUS DEBT)	\$	\$

All information on this form is true and complete to the best of my knowledge. I understand that purposely giving false or misleading information on this form may result in reduced eligibility and/or repayment of aid.

 STUDENT SIGNATURE

 DATE

 PARENT SIGNATURE IF DEPENDENT

 DATE

Upload This Completed Form via the Student Portal or
Mail: UMass Global Financial Aid Office, 65 Enterprise, Suite 150, Aliso Viejo CA 92656-2707