



Student Name: _____ Class of: _____

HUID: _____

Answer each question below. Do not leave any blank. If more space is needed, provide a separate page with the student's name and HUID number at the top. All numbers should be in \$US.

A. Total of all cash, savings, and checking accounts, including any student assets.

Net Total: \$

B. Market value and debt of real estate (both US and abroad)

Include your primary home, all rental property, and all personal real estate (including land and second /summer homes). Also include any portion of a multi-family dwelling that is not the family's principal residence.

Real estate address (Street, City, State, Country)	Purchase year	Purchase price	Fair market value*	Debt	Ownership
					%
					%
					%
					%
					%
					%

Net Total: \$

*How did you arrive at the "Fair market value"? _____



C. Market value and debt of other investments

Type of investment	Value	Debt
Trust funds		
Money market funds		
Mutual funds		
Certificates of deposit		
Education savings account (Coverdell, 529 , UGMA, UTMA, etc.)		
Stocks (not in a traditional retirement account)		
Stock options		
Bonds (not in a traditional retirement account)		
Other non-retirement securities		
Installment and land sale contracts		
Commodities		
Retirement plans (IRA, 401(k), SEP, SIMPLE, etc)		
Cash value of life insurance		
Other		

Net Total: \$



D. Market value and debt of business and/or farms

Include the value of land, buildings, machinery, equipment, livestock and inventory, etc. Business and or farm debt means only those debts for which the business or farm was used as collateral.

Name of business/farm	Type of tax form filed?	Fair market value	Debt

Net Total: \$

If the market value of your home, other real estate, or farm is zero or negative, please provide an explanation in the space below or attach a separate explanation.

Certification: By signing this, I confirm that I have read the instructions and information on this form. I understand that this information is used to determine eligibility for financial aid from Harvard. I have included all of my family's asset information and the information that I have completed is true to the best of my knowledge. I understand that it is illegal to report false or misleading information. The Committee on Financial Aid reserves the right to ask for account statements to verify information provided.

Parent 1 signature: _____ Date: _____

Parent 2 signature: _____ Date: _____