



Office of Student Financial Services
 12 East 53rd St, New York, NY 10022
 sfs@limcollege.edu
 Phone: 212-310-0689
 Fax: 212-750-3452

2025-2026 Assets and Investments Statement

The following information is required because your 2023 tax return shows assets and/or investments that you did not report the "net worth" for on your 2025-2026 Free Application for Federal Student Aid (FAFSA). **All assets should be reported as of the date that you originally signed the 2025-2026 FAFSA. (Use black or blue ink only. No cross-outs or white-outs.)**

STUDENT INFORMATION

 Last Name

 First Name

 MI

 LIM ID

 LIM Email @limcollege.edu

INSTRUCTIONS

- Market value means the value of the investment if it was sold on the date you filed your FAFSA.

DO NOT INCLUDE

- UGMA and UTMA accounts for which you are the custodian, but not the owner
- Retirement plans and whole life insurance

ASSET AND INVESTMENT INFORMATION

	STUDENT AND SPOUSE (if applicable)	PARENT(S) (if dependent)
	Asset Value	Asset Value
Cash, Savings, and Checking Accounts	\$	\$
	Investment Market Value	Investment Market Value
Stocks, Stock Options, Bonds, Other Securities, Commodities, Mutual Funds, Money Market Funds	\$	\$
UTMA, UGMA, College saving plans, Coverdell education savings accounts, Trust funds	\$	\$

Certification Statement: *Handwritten signature(s) ONLY*

By signing this form, I/we certify that all the information on this form is accurate and complete.

Student Signature:	Date:
Parent Signature (Dependent Student Only):	Date: