



**University of Houston  
Asset/Business Questionnaire Form  
Award Year 2007-2008**



• University of Houston • Office of Scholarships and Financial Aid •  
Mail: 31 E. Cullen Building • Houston, TX 77204-2010  
In Person: Welcome Center Room 120

Please read the instructions below regarding assets/businesses/investments for either yourself (and/or your spouse) or for your parents.  
**Enter zeros if not applicable.** The value reported should be the fair market value *as of the date you completed your 2007-2008 FAFSA.*

<b>Last Name</b>	<b>First Name</b>	<b>MI</b>	<b>PeopleSoft ID Number</b>	<b>E-Mail Address</b>
------------------	-------------------	-----------	-----------------------------	-----------------------

Reporting Information	Asset Information:	Value:		Debt:	
		Parent:	Student:	Parent:	Student:
<b>Excluded Assets:</b> Do not report principal residence, family farms, or retirement plans (IRA, Keogh, 401[k], etc.)	<b>Cash, savings, and checking accounts:</b>	\$ _____	\$ _____		
<b>Custodial Accounts for Minor Children (i.e., Uniform Gifts to Minors):</b> Report as student (not parent) asset.	<b>Trusts:</b> Trust Funds	\$ _____	\$ _____		
<b>Joint Accounts Other Than Those Shared with Your Spouse:</b> Report only your share of joint accounts.	<b>Investments:</b> Money Market	\$ _____	\$ _____		
<b>Savings Bonds:</b> For bonds that have not matured, check with your bank for current values.	Mutual Funds	\$ _____	\$ _____		
<b>Trust Funds:</b> Current value, plus interest, unless trust is restricted by court order (for example, to cover future medical expenses in an insurance settlement).	CDs	\$ _____	\$ _____		
<b>Qualified Educational Plans ("529" plans, Texas Tomorrow Funds, Coverdell savings accounts):</b> Report as parent's asset if student is dependent and parents own the plan. Report as student's asset if student is independent and owns the plan. Exclude as asset if dependent student owns the plan.	Bonds	\$ _____	\$ _____		
<b>Installment or Land Contracts:</b> Report the current principal and interest balance remaining on contract.	Trust Funds	\$ _____	\$ _____		
<b>Small Business:</b> The net worth of the business is excluded if the family owns the business and employs fewer than 100 full-time or FTE employees.	College Savings Plans	\$ _____	\$ _____		
	Other	\$ _____	\$ _____		
	<b>Real Estate:</b> Rental Property	\$ _____	\$ _____	\$ _____	\$ _____
	Second Home	\$ _____	\$ _____	\$ _____	\$ _____
	Land Contracts	\$ _____	\$ _____	\$ _____	\$ _____
	Other	\$ _____	\$ _____	\$ _____	\$ _____
	<b>Business(es)</b> If business has no value, enter 0. If family owned with fewer than 100 FTE employees, enter N/A.	\$ _____	\$ _____	\$ _____	\$ _____
	<b>Non-Family Farm(s)</b>	\$ _____	\$ _____	\$ _____	\$ _____
	<b>S-Corporation(s)</b>	\$ _____	\$ _____	\$ _____	\$ _____
	<b>Non S-Corporations</b>	\$ _____	\$ _____	\$ _____	\$ _____

**Sign this Worksheet**

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. If dependent, at least one parent must sign.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature (Dependent Students Only)

\_\_\_\_\_  
Date

State law requires that you be informed of the following: (1) with few exceptions, you are entitled on request to be informed about the information the University collects about you by use of this form; (2) under sections 552.021 and 552.023 of the Government Code, you are entitled to receive and review the information; and (3) under section 559.004 of the Government Code, you are entitled to have the University correct information about you that is incorrect.