



# What Investments Do I Need To Report When I Fill Out the FAFSA

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## Investments to include

- Rental property (current value minus current debt)
- Trust funds
- Money market funds
- Mutual funds
- Certificates of deposit
- Stocks
- Stock options
- Bonds
- 529 college savings plans
- UGMA/UTMA accounts (for which you are the owner)

## Do NOT Include

- Primary place of residence
- Value of life insurance
- 401[k] plans
- Pension funds
- Annuities
- Non-education IRAs
- Balances of cash, general savings, and checking accounts (reported in another FAFSA question)
- UTMA/UGMA accounts (for which you are the custodian)