

Asset Summary Worksheet - STUDENT ACADEMIC YEAR 2017-2018

Student Name:		
	(last)	(first)
		(middle initial)
Last Four Digits of Student SSN: XXX - XX -		UW Student ID #:

To confirm your 2017-2018 financial aid eligibility, our office requires additional information about your (and your spouse's) assets. Please complete the information below and submit this form to our office. *Respond to all questions. Incomplete forms will not be processed and will be returned to you for clarification.*

►► **If the answer is zero, please indicate '0' or 'N/A'. We are not able to accept blank as an answer.**

NOTE: Report the asset value that was true as of the date you filed your original 2017-2018 Free Application for Federal Student Aid (FAFSA).

Asset Type	Value	Debt
	DO NOT LEAVE ANY BLANKS	
Cash, Savings, and Checking accounts	\$_____.	XXX
Real Estate (see note 1 below)	\$_____.	\$_____.
Investments (see note 2 below)	\$_____.	XXX
College Savings Plans (see note 3 below)	\$_____.	XXX
Business (see note 4 below)	\$_____.	\$_____.
Farm: <i>If farm value/debt is listed, please answer below:</i> <i>Does your family live on the farm?</i> <input type="checkbox"/> Yes <input type="checkbox"/> No	\$_____.	\$_____.

¹ **Real Estate** - Report any property owned, including installment and land sale contracts (including mortgages held). Do NOT include your primary residence. If you are a partial owner, report only your percentage of the value and debt of the property.

² **Investments** - Include the value of trust funds, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, commodities, etc. Do NOT include the value of life insurance, retirement plans, or assets listed elsewhere on this form.

³ **College Savings Plans** - Report any UGMA and UTMA accounts, Coverdell savings accounts, 529 college savings plans, and/or the refund value of 529 prepaid tuition plans that you and/or your spouse own for any member of the household. DO NOT include UGMA and UTMA accounts for which you are custodian, but not the owner.

⁴ **Business** - Include market value of land, buildings, machinery, equipment, inventory, etc. Do not include the value of a small business if your family owns and controls more than 50% of the business *and* the business has 100 or fewer full-time equivalent employees. For small business value, your family includes (1) persons directly related to you, such as a parent, sister or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law.

I certify the information provided on this form is true and complete to the best of my knowledge.

Student Signature: _____ Date: _____