



Student's Name: _____ (WIT ID) #: _____

In order to complete your financial aid application, we need additional information about your assets. Please complete this form and return it immediately to the Student Service Center (SSC).

These figures must reflect your assets as of the date your original FAFSA was submitted.

Dependent Students: (Parental data was required on your FAFSA) Complete the student and parent columns. Parent and Student sign this form.

Independent Students: Complete student/spouse column. Student/spouse must sign this form.

Please indicate below the net worth of the following assets and investments as of the date you submitted your FAFSA.

If an Item does not apply, Indicate -0- Do Not Leave Blank

ASSETS / INVESTMENTS	Student/ Spouse	Parent(s)
Total balance of cash, savings, and checking accounts? As of the date FAFSA was submitted Do not include student financial aid.	\$	\$
Net worth of investments, including real estate? As of the date FAFSA was submitted Do not include the home you live in. Net worth means current value minus debt.	\$	\$
Net worth of businesses and/or investment farms? As of the day FAFSA was submitted Do not include a family farm that you live on and operate or a family business with 100 or fewer full-time or full-time equivalent employees.	\$	\$

IMPORTANT NOTES:

Net worth means current value minus debt. If net worth is negative, enter zero.

Investments include real estate (do not include the home you live in), trust funds, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc.

Investments also include qualified educational benefits or education savings accounts (e.g. Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans). For a student who does not report parental information, the accounts owned by the student (and/or the student's spouse) are reported as student investments. For a student who must report parental information, the accounts are reported as parental investments, including all accounts owned by the student and all accounts owned by the parents for any member of the household.

Investments do not include the home you live in, the value of life insurance, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings and checking accounts already reported. **Investments also do not include** UGMA and UTMA accounts for which you are the custodian, but not the owner.

Investment value means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments.

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

Business value does not include the value of a small business if your family owns and controls more than 50 percent of the business and the business has 100 or fewer full-time or 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, step-parent or sister-in-law.

Investment farm value does not include the value of a family farm that you (your spouse and/or your parents) live on and operate.

The Financial Aid Staff may require bank statements, appraisals, and/or other documents to verify this information.

Student's signature: _____ Date: _____

Spouse's Signature: _____ Date: _____

Parent's signature: _____ Date: _____