2015-2016 ASSET FORM

Student Name (print)  WOU Student ID

You left some or all of the asset section on your Free Application for Federal Student Aid (FAFSA) incomplete. Please complete this form with the **value of your assets as of the day you completed your original FAFSA**. Return this completed form to the Western Oregon University Financial Aid Office so we can continue to process your financial aid application.

Please complete the sections below:

<table>
<thead>
<tr>
<th>ASSET INFORMATION</th>
<th>STUDENT</th>
<th>SPOUSE</th>
<th>PARENT(1)</th>
<th>PARENT(2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash, savings, and checking accounts:</td>
<td>$_______</td>
<td>$_______</td>
<td>$_______</td>
<td>$_______</td>
</tr>
<tr>
<td>Net worth of investments:</td>
<td>$_______</td>
<td>$_______</td>
<td>$_______</td>
<td>$_______</td>
</tr>
</tbody>
</table>

(Investment value minus investment debt)

**Investments include** real estate (do not include the home you live in), trust funds, UGMA and UTMA accounts, 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 educational 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 (e.g., 401[k] plans, pension funds, annuities, non-educational 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 investments.

**Business and/or investment farm**

| $_______ | $_______ | $_______ | $_______ |

(Market value minus debt)

**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 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.

_______________________________________________________  ______________________________
Student Signature                                                    Date

_______________________________________________________  ______________________________
Parent Signature                                                      Date

This document is available in alternative formats. Please give reasonable notice to the Financial Aid Office.