



WESTERN OREGON UNIVERSITY

ASSET FORM 2011-2012

Student's Name (please 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 the form to the Financial Aid Office so we can continue to process your financial aid application.

Please complete the highlighted sections below.

ASSET INFORMATION

STUDENT

PARENT(S)

Cash, savings and checking accounts

\$ _____

\$ _____

Net worth of investments

\$ _____

\$ _____

(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 education savings accounts such as Coverdell savings accounts, 529 college saving 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

\$ _____

\$ _____

(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 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.

Student's signature _____

Date _____

Parent's signature _____

Date _____

This document is available in alternative formats. Please give reasonable notice to the
Financial Aid Office at 503-838-8475 or toll free at 1-877-877-1593.

Financial Aid Office

345 North Monmouth Avenue • Monmouth, Oregon 97361 • 503-838-8475 • Fax: 503-838-8200 • www.wou.edu • finaid@wou.edu