



## 2017-2018 STUDENT ASSETS FORM

Student Name: _____	Student ID or SSN: _____
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**Student:** *provide the below information for you (and your spouse) as of the date your original 2017-2018 Free Application for Federal Student Aid or FAFSA was submitted.*

- What was the total balance of cash, savings, and checking accounts (exclude financial aid):** \$ \_\_\_\_\_
- List the net worth of the items below. Net worth means current value minus debt. When calculating net worth, use \$0 for investments or properties with a negative value.
  - Investments** Include real estate (such as rental property, land, and second or summer homes - do not include your primary place of residence or family farm if the farm is your principal place of residence and you "materially participated in the farm's operation"), trust funds, Uniform Transfers to Minors Act (UTMA)/Uniform Gifts to Minors Act (UGMA) accounts where you are the owner, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, all qualified educational benefits or education savings accounts (including Coverdell Savings Accounts, 529 college savings plans, and the refund value of 529 prepaid tuition plans if you own the account(s) and did not report parental information on your 2017-18 FAFSA), installment and land sale contracts (including mortgages held), commodities, etc.

**Investment value** includes the current balance or market value of these investments as of the day the FAFSA was filed. *Do not include* your primary residence, cash, savings, checking accounts, the value of life insurance and retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.).

**Investment debt** means only those debts that are related to the investments.

**Investment Value – Investment Debt = Investment Net Worth:** \$ \_\_\_\_\_

- Business and/or Investment Farm** If you are not the sole owner, report only your share of its value and debt. *If your family owns and controls more than 50% of a small business with 100 or fewer full-time or full-time equivalent employees, do not report the business as an asset.* 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. An investment farm is a farming business where you do not reside on the farm, nor do you materially operate it.

**Business and/or Investment Farm value** includes the current market value of land, buildings, machinery, equipment, inventory, etc. Do not include your primary home.

**Business and/or Investment Farm debt** means what you owe on the business/investment farm; include only those debts for which the business or investment farm was used as collateral.

**Business/Farm Value – Business/Farm Debt = Business/Farm Net Worth:** \$ \_\_\_\_\_

*I certify that all information reported to qualify for federal student aid is complete and correct.*

\_\_\_\_\_  
Student Signature (handwritten, not typed)

\_\_\_\_\_  
Date

**Submit form to:**

UW Colleges Student Financial Aid Office  
780 Regent St, Suite 130  
Madison, WI 53715-2635