



WESTERN MICHIGAN
UNIVERSITY

STUDENT NAME: _____
 WIN: _____
 DAYTIME PHONE: _____
 ADDRESS: _____
 CITY, STATE, ZIP: _____

WMU Student Financial Aid
 1903 W Michigan Ave
 Kalamazoo MI 49008-5337
 (269) 387-6000
 finaid-info@wmich.edu

2019-20 ASSET INFORMATION

	<u>PARENT*</u>	<u>STUDENT</u>
1) As of today what is the total current balance of your cash, savings, and checking accounts? (Do not include student financial aid)	\$ _____	\$ _____
2) As of today, what is the net worth of your investments, including real estate (not your home)? (Net worth means current value minus debt).	\$ _____	\$ _____
3) As of today, what is the net worth of your current business and/or investment farms?.....	\$ _____	\$ _____

* Dependent students (those required to put parent information on the FAFSA) need to complete both student and parent columns above. The parent(s) on the FAFSA should list their asset information and also sign in the parent section below.

Investments include real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), 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 (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 in question 42. For a student who must report parental information, the accounts are reported as parental investments in question 91, 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 in questions 41 and 90.

Businesses 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.

Do not include the value of a family farm that you live on and operate. Do not include the value of a small business that you own and control and that has 100 or fewer full-time or full-time equivalent employees.

PARENT SIGNATURE: _____ DATE: _____

STUDENT SIGNATURE: _____ DATE: _____

Return your completed form to Bronco Express on the lower level of the Bernhard Center. You may also email or mail to the address above. Be sure to include your name and WIN on all pages. Missing information may delay the processing of financial aid.