University of Wisconsin Whitewater | Financial Aid Office

800 West Main Street
Whitewater, WI 53190
www.uww.edu/financialaid
p 262-472-1130 f 262-472-5655
uwwfao@uww.edu

2023-2024 Statement of Assets

This form is used to verify potential conflicting data reported on your 2023-2024 Free Application for Federal Student Aid (FAFSA), to clear up FAFSA rejects due to missing asset information, and/or to verify changes that were made to your original FAFSA.

A. Student Information

Last Name _____ First Name _____ M.I. _____ Student ID# _____

B. Asset Information

Report student and parent (if dependent according to FAFSA) assets **as of the day that your 2023-2024 FAFSA was initially completed**. Do NOT leave fields blank. If the answer is zero (0), please enter zero (0).

#	Asset Information as of _____ **The day that your 2023-2024 FAFSA was initially completed.**	Student/Spouse Amount FAFSA Questions 37, 38 & 39	Parent(s) Amount FAFSA Questions 85, 86 & 87
1	What was the total balance of cash, savings, and checking accounts? Do not include student financial aid.		
2	What was the net worth of your investments, including real estate (not your home)? Net worth means current value minus debt. Investments include real estate, trust funds, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, college saving plans, installment and land sale contracts (including mortgages held), commodities, etc. Do not include the home you live in, the value of life insurance, or retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc.).		
3	What was the net worth of your businesses and/or investment farms? Do not include a farm that you live on and operate. Net worth means current 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. Do not include the value of a small business if your family owns and controls more than 50% of the business and the business has 100 or fewer full-time, or equivalent, employees. Do not include the value of a family farm that you live on and operate.		

If you added something incorrectly or if you recently made a change to these questions, please describe why the change was made.

_____

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C. Certification

By signing this worksheet, we certify that all the information reported on it is complete and correct. If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both. Note: We may request additional documentation if we have reason to believe any of the information on this form is inaccurate.

Student Signature (Required) _____ **Date** _____

Parent Signature * _____ **Date** _____

(*Required if the student is a dependent according to FAFSA)