

Student's Name _____

DePauw ID _____

You are being asked to complete this form because the asset information reported on the Free Application for Federal Student Aid (FAFSA) was blank or appears to be inconsistent with tax information or a submitted CSS Profile. Please document the value of your assets as of the date you completed the FAFSA.

Do not leave any amount blank; write "0" if the item does not apply or if the value is negative.

ASSET INFORMATION	Student (& Spouse)	Parent(s)
1. Total of cash, savings and checking accounts at the time you filed the FAFSA. Do not include student financial aid.	\$	\$
2. Net worth of your investments at the time you filed the FAFSA. Include real estate, but do not include the home the student/parent lives in. <i>Net worth is the value of the investments minus any debts owed against them.</i>	\$	\$
3. Net worth of businesses and investment farms. Include student's/parent's businesses or for-profit agricultural operations. <i>Net worth is the value of the businesses or farms minus any debts owed against them.</i>	\$	\$

Net worth means the value, as of the day you completed the FAFSA, minus debts related to the same investments. If net worth is negative, enter 0.

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 education benefits or education savings accounts such as Coverdell savings accounts, 529 college savings plans, and the refund value of 529 prepaid tuition plans. If the student is required to report parent information on the FAFSA form, parents should not report the value of education savings accounts for other children. Qualified education benefits or education savings accounts must be reported as an asset of the parent if the student is required to report parent information. If the student is not required to report parent information on the FAFSA form, the education benefit or savings account is reported as an asset of the student. UGMA and UTMA accounts are considered the assets of the student and must be reported as an asset of the student on the FAFSA form, regardless of whether the student is required to report parent information.

Investments do not include the home you live in, the value of life insurance, ABLE accounts, retirement plans (401[k] plans, pension funds, annuities, noneducation IRAs, Keogh plans, etc.), or cash, savings, and checking accounts reported in the previous question. **Investments also do not include** UGMA/UTMA accounts for which the student is the custodian but not the owner or the value of qualified education benefits or education savings accounts that are for the benefit of the parent's other children (not the student).

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.

Businesses and investment farms include businesses that you own (including a small or family-run business) or income-producing farms that you own (including the fair market value of land, buildings, livestock, unharvested crops, and machinery actively used in investment farms, agricultural, or commercial activities).

Businesses and investment farms do not include the value of crops that are grown solely for consumption by the student and their family or the home in which you live. If the home in which you live is also located on a farm that you own, do not include the net value of that principal residence in the net value of all farm assets. The principal residence may include the home, structures, and land that are adjacent to the home that are not being used, stored, or sold for farming or other commercial activities.

Each person signing this form certifies that the information reported on it is complete and correct. The student and one parent must sign and date. This form should be submitted directly to the Financial Aid Office using one of the contact methods listed at the bottom of the form.

Student's Signature _____

Date (mm/dd/yyyy) _____

Parent's Signature _____

Date (mm/dd/yyyy) _____

DePauw University
Financial Aid Office
P.O. Box 37
Greencastle, IN 46135-0037

765.658.4030 | 800.447.2495
*We do not accept documents by email or fax.
Please upload your documents on your portal.
depauw.edu/offices/financialaid