



## Verification of Assets Parent/Parent’s Spouse or Partner

As a parent *or* parent’s spouse/partner of a dependent student, you have been selected to verify your current assets. Unlike other verification information, the reported assets or debts submitted should be as of the date your student filed the 2024-2025 FAFSA. For assets or debts owned jointly with someone else (other than your spouse), such as a business, provide only your portion.

_____	_____
Student Name	CWU Student ID#:

### Instructions:

- **Complete page 1 and 2 of this form-** see pg. 3 for instructions on retrieving tax data from the IRS.
- **Print and Sign forms with handwritten signature-** Per Federal regulations, contributor(s) must sign forms with a handwritten signature. If you are providing information for two parents/partners, both must sign the form. If you do not have access to a printer, you may request a form be mailed to you. Email: [financialaid@cwu.edu](mailto:financialaid@cwu.edu)
- **Submit form and required documentation-**You have the option to allow your student to upload documents to their MyCWU portal **OR** send the forms directly to financial aid- [financialaid@cwu.edu](mailto:financialaid@cwu.edu).

### Please select one of the following:

- One Parent Only:** I am the parent or parent’s spouse/partner listed on my student’s FAFSA. I am providing the asset information for myself only. I am either not married or my spouse/partner was not asked to verify their assets.
- Parents (Parent and Spouse/Partner):** I am married or living with the other parent listed on the student’s FAFSA. We are providing our asset information as of the date the student filed the FAFSA.

**Important:** To be eligible for federal aid, the student and all contributors are required to consent and approve data sharing and importing income/tax information from the IRS to the FAFSA form. This includes you and your spouse if you are on the student’s FAFSA. Consenting to share your information does not make you responsible for your student’s educational expenses. When using the Federal Tax Information (FTI) transfer, most cases do not require further documentation. Even if data sharing and import are unsuccessful, or you and your spouse filed taxes separately in 2022, you must provide consent for your student to be eligible for Federal aid.



**Personal Assets- Report personal assets for you (and other contributor on FAFSA, if applicable).**

\$ \_\_\_\_\_

- **Cash, savings and checking accounts:** Include cash, savings and checking accounts as of the day your student first submitted the 2024-2025 FAFSA. **Do not include student financial aid.**

\$ \_\_\_\_\_

- **Investment and real estate assets:**

- **Include:**

- Real estate, rental property (including a unit within a family home), land, multi-family dwellings (except the part your family occupies), installment and land sale contracts (including mortgages held)
    - UGMA or UTMA accounts, trust funds (in your or your spouse’s name including those you cannot access)
    - Money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, commodities
    - 529 college saving plans, value of 529 prepaid tuition plans, qualified educational benefits or education savings accounts, Coverdell savings accounts, etc

- **Do not include:**

- Your primary residence
    - The value of life insurance, retirement (401 (k)) plans, pension funds, annuities, non-education IRAs, Keogh plans, etc. or UGMA or UTMA accounts for which you are the custodian but not the owner.

**Personal Debts- Report personal debts for you (and other contributor on FAFSA, if applicable).**

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- **Investment and real estate debt:**

- **Include:** What you owe on investments and other real estate.
  - **Do not include-** your primary residence.

**Report business assets and debts for you (and other contributor on FAFSA, if applicable).**

Only report a family-owned business or investment farm value if it meets the criteria below. Report the portion that belongs to you (and your spouse, if married). If you do not have a reportable business or family farm- enter \$0.

- **Family Business:** You or your family own/control more than 50 percent of the business. Family includes persons directly related to you such as a parent, sister, or cousin or who are related to you by marriage such as a spouse, stepparent, or sister-in-law.
- **Income-producing Farm:** This may be a family farm that you (and/or your spouse) live on and operate, if you grow crops above what the family consumes for sale.

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- **Business assets:** Include the market value of land, buildings, machinery, equipment, inventory, etc.

\$ \_\_\_\_\_

- **Income-producing farm value:** Market value of land, buildings, machinery, equipment, inventory, etc.

**Business or Investment Debts**

\$ \_\_\_\_\_

- **Business debt:** Debts for which the business or was used as collateral including mortgage, business loans, and other debts owed by the business

\$ \_\_\_\_\_

- **Income-producing farm debt:** Debts for which the farm was used as collateral including mortgage, loans, and other debts owed by the farm.

**Certification- One Parent**

By signing below, I certify all information reported is complete and correct.

*Parent Signature (handwritten signature is required)*

*Date*

**Certification- Other Parent**

By signing below, I certify all information reported is complete and correct.

*Parent Spouse/Partner Signature (handwritten signature is required)*

*Date*