



## Assets Verification Student/Student's Spouse

You and/or your spouse have been selected to verify your current assets. Unlike other verification information, the reported assets or debts submitted should be as of the date you filed the 2024-2025 FAFSA. Complete this form if you, the student (and spouse if married) have been selected to verify assets.

*Notify the financial aid office if you had a change in marital status after December 31, 2022.*

_____	_____
Student Name	CWU Student ID#:

### Instructions:

- **Complete page 1 and 2 of this form-** do not leave any blanks-enter \$0 if the question does not apply.
- **Print and Sign forms (if required)-** Student signature is not required if uploaded to MyCWU portal and verification is for the student only (no other contributors on your FAFSA were selected). If your spouse was selected for verification, your spouse **must print form and provide handwritten signature**. 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)
- **Upload form and required documentation to your CWU To-Do list-** the CWU office will not upload forms for students.

### Please select one of the following:

- Student Only:** I am providing the asset information for myself only. I am either not married or my spouse was not asked to verify their information.
- Student's Spouse Only:** I am married to the student and completing this form. I am providing asset information for myself only.
- Student and Spouse:** I am married and providing information for me and my spouse. I am completing this form with my spouse to provide asset information as of the date I filed the FAFSA.

**Important:** To be eligible for federal aid, you, 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 your spouse (if married) or your parent/s (if you are a dependent student). When using the Federal Tax Information (FTI) transfer, most cases do not require further documentation. Even if data sharing and import are unsuccessful or student/spouse/parents filed taxes separately in 2022, **all must provide consent to be eligible for Federal aid.**



**Personal Assets- Report personal assets for you (and your spouse if married).**

- **Cash, savings and checking accounts:** Include cash, savings and checking accounts as of the date you 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 plans (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 your spouse if married).**

- **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 your spouse if married).**

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 Farm:** 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.

- **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- Student**

I understand that submitting this form electronically through **MyCWU portal** constitutes my signature and my certification that the information provided herein is complete and correct.

*Student Signature (not required if submitted through your MyCWU portal)*

*Date*

**Certification-Spouse (must sign in married)**

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

*Spouse Signature (handwritten signature is required)*

*Date*