

2021-2022 Asset Information Form



Office of Scholarships and Financial Assistance

800 University Drive Office: 660-562-1363
Maryville, MO 64468 Fax: 660-562-1674
finaid@nwmissouri.edu Toll Free: 800-633-1175

Student information

_____ Last name	_____ First name	_____ Middle initial	_____ Northwest 919 number	
_____ Address	_____ City	_____ State	_____ ZIP	_____ Phone Number

This form is required to verify the asset information reported on your 2021-2022 FAFSA. Please provide the information below as of the day the original 2021-2022 FAFSA was filed.

Asset information	Parent(s)/Stepparent	Student/Spouse
Cash, savings and checking account total	\$ _____	\$ _____
Net worth of real estate/investments	\$ _____	\$ _____
Net worth of business and/or investment farm	\$ _____	\$ _____

If the information reported above is significantly different from information reported on the original 2021-2022 FAFSA, please explain the variance.

Net worth means current value minus debt. If net worth is negative, enter 0.

Investments include real estate (do not include the home in which you live), rental property, 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).

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.

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. **Investments also do not include** UGMA and UTMA accounts for which you are the custodian, but not the owner.

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. **Business value does not include** the value of a small business if your family owns and controls more than 50 percent of the business and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, your family includes (1) persons directly related to you, such as a parent, sister or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law. **Investment farm value does not include** the value of a family farm that you (your spouse and/or your parents) live on and operate.

Certification statement

By signing, I certify that all information reported is complete and accurate.

_____ Student Signature (required)	_____ Date	_____ Parent Signature (required for dependent students)	_____ Date
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Warning: If you purposely give false or misleading information, you may be fined, be sentenced to jail, or both.