

## Purpose

This form is used to help the Financial Aid Office clarify the value of specific assets and investments for you (and your spouse, if applicable) as of your initial FAFSA filing date so that we can confirm your maximum financial aid eligibility.

## Student Information

<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name	First Name	Social Security Number
<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone Number	Date of Birth	WJU ID Number (last 5 digits)

## Student Assets (including spouse, if applicable)

Please read all information carefully. In every case, use figures as of the time you completed your original FAFSA. Do not leave any amount blank. If the amount is negative or zero, enter [\$0] for the amount.

<b>Current Value</b>	-	<b>Debt</b> (amount owed)	=	<b>Net Worth</b>
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CASH, SAVINGS, AND CHECKING	Balance
Total balance of all cash, savings and checking accounts for you (and your spouse, if applicable).	_____ .00

REAL ESTATE	Net Worth
<b>Do not include</b> the home you live in (primary residence). <b>Include</b> rental properties, land, second homes and/or summer homes.	_____ .00

OTHER INVESTMENTS	Net Worth
<b>Do not include</b> the value of life insurance, retirement plans, 401(k) plans, pension funds, annuities, non-education IRAs, SEP, Keogh plans or other official retirement accounts. <b>Include</b> the net worth of 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, 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).	_____ .00

**Complete all information on the next page.**



## Student Assets (continued)

Do not leave any amount blank. If the amount is negative or zero, enter [\$0] for the amount.

BUSINESS VALUE	Net Worth
<p><b>Do not include</b> 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 persons directly related to you, such as a parent, sister or cousin, or persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law.</p> <p><b>Include</b> the market value of land, buildings, machinery, equipment, inventory, etc.</p>	= _____ .00

INVESTMENT FARM VALUE	Net Worth
<p><b>Do not include</b> the value of a family farm that you (your spouse and/or parents) live on and operate.</p> <p><b>Include</b> the market value of land, buildings, machinery, equipment, inventory, etc.</p>	= _____ .00

**Note:** If significant changes to your assets or investments have occurred since the original FAFSA filing, please indicate those changes below. Documentation to support such reduction to assets or investments will be required in order for the Financial Aid Office to fairly assess the current financial situation.


## Signatures

By signing this form, I/we certify that all of the information reported on this form and all supporting documents is true, accurate and complete. If requested, I agree to provide the Financial Aid Office with further proof of the information reported on this form. If you purposely give false or misleading information, you may be fined up to \$20,000, sent to prison, or both.

Student's Signature (required)	Date

Spouse's Signature (if married)	Date

**Please return this form to:**  
 William Jessup University • Attn: Financial Aid Office • 2121 University Ave. • Rocklin, CA 95765