

### 2023-2024 Asset and Investment Value Worksheet

Student's Name: \_\_\_\_\_ WCJC Student ID: \_\_\_\_\_

Please provide the information as of the date you filed your Free Application for Federal Student Aid (FAFSA). If you were required to provide parental information on your FAFSA, you must complete both the parent and student sections. If you were married when you filed the FAFSA, include information for both you and your spouse. **Do not leave any blanks. If an asset type does not apply, indicate this by writing "0" (zero).**

Student/Spouse	Asset Type	Parent(s)
\$	<b>Total balance of cash, savings, and checking accounts</b>	\$
\$	<b>Net worth of investment value, including real estate</b> <ul style="list-style-type: none"> <li>• Include rental property, trust funds, money market funds, mutual funds, certificates of deposits, stocks, stock options, bonds and other securities, and qualified educational benefits or education savings accounts (529 college savings plans and the refund value of 529 prepaid tuition).</li> <li>• Do not include the home you live in, retirement 401(k) plans, pension funds, annuities, or non-education IRAs.</li> </ul>	\$
\$	<b>Net worth of business and/or investment farm value</b> <ul style="list-style-type: none"> <li>• Include market value of land, buildings, machinery, equipment, and inventory.</li> <li>• Do not include the value of a small business if it has 100 or fewer full-time employees.</li> <li>• Do not include the value of a family farm that you, your spouse, and/or your parents live on and operate.</li> </ul>	\$

#### Certification Statement and Signatures

By signing below, I/we acknowledge and confirm that the above information is complete and correct. Purposely giving false or misleading information may result in federal fines, jail sentence, or both. If student is dependent, one parent whose information was reported on the FAFSA must sign and date this form.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Print Parent's Name

\_\_\_\_\_  
Date

Form can be signed in ink or with an electronic stylus or finger. Typed signatures are not acceptable. Complete form can be scanned and emailed to [finaid@wcjc.edu](mailto:finaid@wcjc.edu); faxed to 979-532-6937; delivered by hand to any WCJC campus Financial Aid Office; or mailed to: WCJC Office of Financial Aid; 911 Boling Hwy; Wharton, TX 77488.