Financial Services
216 O'Dowd Hall
2200 North Squirrel Road
Rochester, Michigan 48309
medfinservices@oakland.edu
(248) 370-3611 phone
(248) 370-4276 fax

2015-2016 OUWB Student Statement of Assets

Student Name _____ G#_____

Section A – Cash, Savings, and Checking Accounts:

Value as of the date FAFSA was filed:

Checking Account: _____+ Savings Account: _____ + Cash: _____ = **Total:** _____

Section B – Real Estate and Other Investments:

Investments include real estate (do not include the home you live in), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, 529 college savings plans, the refund value of 529 prepaid tuition plans, installment and land sale contracts (excluding mortgages held), commodities, etc. For more information about reporting educational savings plans call 1-800-4-FED-AID.

Include the net worth of all **S-Corporations, Partnerships, and Rental Properties listed on Schedule E** of your 2013 federal tax return.

Do not include the value of life insurance, retirement plans (401[k] plans, pension funds, annuities, non-education IRA's, Keogh plans, etc.) or cash, savings, and checking accounts already reported in **Section A**.

Total value of all assets as of the date FAFSA was filed: _____ _____ _____

Current Market Value - Debt = **Net Worth**

Section C – Business*/Investment Farms:

Business* and/or investment farm value includes the market value of **Land, Buildings, Machinery, Equipment, Inventory**. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral.

*Business owners: Do not include the value of any business that is either family owed or employs less than 100 full-time equivalent employees.

Total value as of the date the FAFSA was filed: _____ _____ _____

Current Market Value - Debt = **Net Worth**

I certify that the above information accurately represents my/our financial situation at the time of filing the FAFSA

Student Signature _____ Date _____

Spouse Signature _____ Date _____