



OUWB Financial Services  
 E-mail: [medfinservices@oakland.edu](mailto:medfinservices@oakland.edu)  
 Phone: (248) 370-3611  
 Fax: (248) 370-4276

## 2018-2019 OUWB Asset Verification Form

### A. Student's Information

|           |            |      |                 |
|-----------|------------|------|-----------------|
|           |            |      |                 |
| Last Name | First Name | M.I. | Grizzly ID (G#) |

### B. Cash, Checking, and Savings Accounts as of the date FAFSA was filed.

Student Information: (Cash + Checking Balance + Savings Balance) = Total: \$

Parent Information: (Cash + Checking Balance + Savings Balance) = Total: \$

### C. Real Estate and Other Investments

**Include:** real estate (other than 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 (including mortgages held), commodities, etc. Also include the net worth of all S-Corporations, Partnerships, and Rental Properties listed on Schedule E of your 2016 Federal tax return.

**Do not include:** the value of the home you live in, 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 C.

Net worth as of the date FAFSA was filed: (Current Market Value – Debt = Net Worth)

**Student Net Worth:** \$  **Parent Net Worth:** \$

### D. Business/ Investment Farms

Business and/or investment farm value includes the market value of land, buildings, machinery, equipment, and inventory. Business and/or investment farm debt means only those debts for which the business or investment farm used as collateral.

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

Net worth as of the date FAFSA was filed: (Current Market Value – Debt = Net Worth)

**Student Net Worth:** \$  **Parent Net Worth:** \$

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

\_\_\_\_\_  
 Student Signature

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Parent Signature

\_\_\_\_\_  
 Date