PURDUE UNIVERSITY NORTHWEST

OFFICE OF FINANCIAL AID

Independent Asset Information for 2026-2027

DIRECTIONS: Complete all items below and return this form to the Office of Financial aid. **Asset Information should reflect value at the time the FAFSA was completed**. For each question, if net worth is one million dollars or more, enter 999,999. If net worth is negative, enter 0. Round all figures to the nearest whole dollar. **Do not leave any amount blank.**

SECTION 1: ASSET INFORMATION

CASH, SAVINGS and CHECKING: What was your (and spouse's) total balance of cash, savings and checking accounts? (Do not include student financial aid)

STUDENT (and SPOUSE if married)

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INVESTMENTS: What was the net worth of your (and spouse's) investments, including real estate? Do not include the home you live in. Net worth is the current value of investments, businesses and/or investment farms minus debt related to the same investments. If net worth is negative, enter $0.

STUDENT (and SPOUSE if married)

$____________________________________

Investments include: real estate (do not include the home you live in), rental property (includes a unit within a family home that has its own entrance, kitchen and bath, rented to someone other than a family member), 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). For a student who does not report parental information on the FAFSA form, the education benefit or savings account is reported as an asset of the student. UGMA and UTMA accounts are considered the assets of the student (if the owner and not custodian of the account) and must be reported as an asset of the student on the FAFSA form, regardless of whether the student is required to report parent information. Accounts owned by the student (and/or the student's spouse) are reported as student investments. Investment value means the current balance or market value of these investments as of the day you filed the FAFSA. Investment debt means only those debts related to the investments.

Investments do not include the home you live in, the value of life insurance, ABLE accounts, retirement plans (401k plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings, and checking accounts already reported in the previous question. Investments do not include UGMA/UTMA accounts for which the student is the custodian but not the owner.

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.

Continued

BUSINESS and INVESTMENT FARMS: What was the net worth of your (and spouse's) businesses and/or investment farms?

STUDENT (and SPOUSE if married)

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Businesses and investment farms include businesses (including small or family-run businesses) owned by you that have more than 100 full-time (or full-time equivalent) employees, along with the fair market value of real estate owned by the business. They also include income-producing farms that you own, including the fair market value of land, buildings, livestock, unharvested crops, and machinery actively used in farming, agricultural, or commercial

Businesses and farms do not include businesses with 100 or fewer full-time (or full-time equivalent) employees; the value of a family farm on which the family resides; the value of crops that are grown solely for consumption by the student and their family; a commercial fishing business and related expenses, including fishing vessels and permits owned and controlled by the family; or the home in which you live.

SECTION 2: CERTIFICATION (Provide all required signatures and PUID below)

Individuals indicated below must sign and date this form, certifying that all information provided is true, complete and accurate.

STUDENT NAME: ____

PUID: ______________________________

STUDENT SIGNATURE: ____

DATE: ______________________________