



2024-2025 Verification of Assets for an Independent Student

Full Name: _____ Evergreen ID: _____

| | |
|--|----|
| As of today, what is your (and your spouse's) total current balance of cash, savings and checking accounts? Do not include financial aid. | \$ |
| As of today, what is the net worth of your (and your spouse's) current investments? <i>See definition below.</i> | \$ |
| As of today, what is the net worth of your (and your spouse's) current businesses and/or investment farms? <i>Do not include the home or farm you live in. See definition below.</i> | \$ |

Signature: _____ Date: _____

Net worth means current value minus debt. If net worth is one million or more, enter \$999,999. If net worth is negative, enter 0.

Investments include (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, 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, the accounts owned by the student (and/or the student's spouse) are reported as student investments in question 41. For a student who must report parental information, the accounts are reported as parental investments in question 89, including all accounts owned by the student and all accounts owned by the parents for any member of the household.

Note: Investments do not include the home you live in, the value of life insurance, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings and checking accounts already reported in questions 40 and 88. Investments also do not include UGMA and UTMA accounts for which you are 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.

Business and/or investment farm value includes 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 (1) persons directly related to you, such as a parent, sister or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law.

Note: Business and/or investment farm value **does not include** the value of a family farm that you live on and operate.

Office of Financial Aid