



**OFFICE OF FINANCIAL AID**  
**2023-24 DEPENDENT ASSET WORKSHEET**

Please complete this asset worksheet accurately, review the following instructions carefully and provide all required documentation.

- Respond to each item entering a zero (\$0) if it does not apply to you.
- Please attach additional pages if necessary.
- If any of the information provided below differs from information reported on your 2023-24 FAFSA, we will make the necessary corrections and a revised award offer will follow.
- We will not be able to award federal, state, or need-based institutional financial aid until you have provided all the information requested below.

## STEP 1: STUDENT INFORMATION

W	XXX-XX-____
STUDENT FULL NAME (PLEASE PRINT)	WOFFORD ID NUMBER      SOCIAL SECURITY NUMBER

## STEP 2: CASH, SAVINGS AND CHECKING ACCOUNTS

Please list below the amounts of cash, savings and checking accounts that you had **as of the date the FAFSA was filed**.

### STUDENT

DESCRIPTION OF ACCOUNT	BALANCE (as of FAFSA filing date)
Example: cash on hand	\$42

### PARENT

DESCRIPTION OF ACCOUNT	BALANCE (as of FAFSA filing date)
Example: savings account	\$15,000

### STEP 3: INVESTMENTS

Please list below the value of investment accounts that you had **as of the date the FAFSA was filed**.

**INCLUDE:** Trust Funds, UGMA & UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, qualified educational benefits or educational savings accounts, commodities, etc. Rental properties and second homes, even if you take a loss on these properties on your taxes.

**DO NOT INCLUDE:** The value of the home you live in, value of life insurance, ABLE accounts, retirement plans (401[k] plans, pension funds, annuities, non-educational IRA's, Keogh plans, etc.), UGMA & UTMA accounts for which you are the custodian, but not the owner.

STUDENT OR PARENT INVESTMENT	DESCRIPTION OF INVESTMENT	VALUE (AS OF FAFSA FILING DATE)
Example: parent	stocks	\$75,000

### STEP 4: BUSINESS OR INVESTMENT FARM VALUE

Please list below the value of your business or investment farm as of the date the FAFSA was filed.

**INCLUDE:** Value of land, buildings, machinery, equipment, livestock, inventory, etc. on farm or business.

**DO NOT INCLUDE:** The value of a small business if the business has fewer than 100 full-time employees. The value of a family farm that you live on and operate or the value of your primary residence, even if it is part of the farm.

STUDENT OR PARENT INVESTMENT	DESCRIPTION OF INVESTMENT	VALUE (AS OF FAFSA FILING DATE)
Example: parent	business	\$75,000

## STEP 5: CERTIFICATION

**WARNING: If you purposely give false or misleading information, you may be fined, sentenced to jail or both.**

By signing this worksheet, we certify that all of the information reported above is true, complete and correct, and give permission to Wofford College to make applicable changes to my FAFSA.

**Electronic signatures are not acceptable.**

\_\_\_\_\_  
STUDENT SIGNATURE (ELECTRONIC SIGNATURES NOT ACCEPTABLE)

\_\_\_\_\_  
DATE

\_\_\_\_\_  
SIGNATURE OF ONE PARENT LISTED ON THE FAFSA  
(ELECTRONIC SIGNATURES NOT ACCEPTABLE)

\_\_\_\_\_  
DATE

**We cannot accept emailed or faxed documents because of privacy and security concerns.  
Please use one of the following methods to submit your documentation.**

**SECURE UPLOAD**

<https://forms.Wofford.edu>  
(Requires student log-in to myWofford.)

**MAIL**

Office of Financial Aid  
Wofford College  
429 N. Church Street  
Spartanburg, S.C. 29303

**IN PERSON**

Hugh S. Black Admin Bldg.  
2nd floor above Admission