



## 2021–22 Asset Verification Request

Name \_\_\_\_\_

Student ID \_\_\_\_\_

Your 2021-22 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. Federal regulation requires confirmation of the information you reported on your FAFSA. We will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected and your eligibility for financial aid may change. You must complete and sign this worksheet, including any required documents, and submit them to our office. You may be asked to provide additional information. If you have questions about verification, contact our office so your financial aid will not be delayed.

A discrepancy exists on your Free Application for Federal Student Aid (FAFSA). To expedite the resolution of this conflict, please furnish the additional information requested. Your file will remain on hold until we can resolve these conflicts. *\*Detailed instructions for each section can be found on the reverse side.*

**A: Cash, Savings & Checking Accounts:**

	Custodial Parent(s) Assets - Include step-parent assets if included on the FAFSA	Student (& Spouse) Assets
Total Value of Cash, Savings & Checking Accounts		

**B: Real Estate Investments:**

Property Address	Property Fair Market Value	Property Debt	% Rented

*Supporting documentation can include a recent appraisal and mortgage statements.*

**C: Business Values:**

Business Name	% Ownership	% Ownership by other family members	Value	Debt

*KIs are required for all businesses. Federal Business Returns must be submitted for businesses not 51% or more owned by family.*

**D: Investment Value excluding real estate, businesses and retirement portfolios:**

Source	Value	Debt

*Copies of current balance statements should be included.*

**Certification and Signature**

I certify that all of the information reported on this worksheet is complete and accurate. **Note: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail or both.**

\_\_\_\_\_  
 Student's signature (required)

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Parent's signature (required)

\_\_\_\_\_  
 Date

*Please mail, email, upload or fax this signed and dated worksheet to the Office of Undergraduate Financial Aid listed above.*

## Parent asset information

Please list all assets of your custodial parent and step-parent, if applicable. If your separated/divorced parents have jointly owned assets, only report the custodial parent's percentage of asset.

**ASSET VALUES ARE PER THE DAY YOU FILED YOUR ORIGINAL FAFSA.**

- A. Cash, Savings & Checking:** Include the balance of your parent(s) cash, savings and checking account per the date you filed your initial FAFSA transaction.
- B. Real Estate:** Include the properties listed on your parent(s) 2019 Federal Tax Return and any subsequently purchased properties. Fair Market Value can be documented by using real estate sites, such as [zillow.com](https://www.zillow.com), or by a recent appraisal. Mortgage statements per the initial FAFSA filing date should be included. **Do not include the home in which you live unless part of the home is rented.** Do include vacation or second homes.
- C. Business Value: DO NOT INCLUDE SCHEDULE C BUSINESSES.** KIs are required for all businesses. If not 51% more owned by family, Federal Business Returns may be requested. The value and debt of the business are based on the percentage of ownership.
- D. Investment Value:** Investments include trust funds (even if funds are restricted), UGMA and UTMA accounts for which you are the OWNER, money market funds, mutual funds, certificate of deposits, stocks, stock options, bonds, other securities and installment or land sale contracts, 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 a 529 prepaid tuition plan). For a student who does not report parental information, the accounts owned by the student (and/or spouse) are reported as student investments. **For a student who must report parental information, the accounts reported as parental investments, including all accounts owned by the student and all accounts owned by the parent for any member of the household.**

**Investments do not include** the home in which you live, unless a portion is rented, the value of life insurance, retirement plans (401K, pension funds, annuities, non-educational IRAs, Keogh plans, etc.) or cash, savings, checking reported separately.

## Student (& spouse) asset information

Please list all assets that belong to you and your spouse (if applicable). If you are married, you must report all assets, including those in your spouse's name.

**ASSET VALUES ARE PER THE DAY YOU FILED YOUR ORIGINAL FAFSA.**

- A. Cash, Savings & Checking:** Include the balance of your parent(s) cash, savings and checking account per the date you filed your initial FAFSA transaction.
- B. Real Estate:** Include the properties listed on your parent(s) 2019 Federal Tax Return and any subsequently purchased properties. Fair Market Value can be documented by using real estate sites, such as [Zillow.com](https://www.zillow.com), or by a recent appraisal. Mortgage statements per the initial FAFSA filing date should be included. **Do not include the home in which you live unless part of the home is rented.** Do include vacation or second homes.
- C. Business Value: DO NOT INCLUDE SCHEDULE C BUSINESSES.** KIs are required for all businesses. If not 51% more owned by family, Federal Business Returns may be requested. The value and debt of the business are based on the percentage of ownership.
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Investments also include qualified educational benefits or education savings accounts (e.g., Coverdell Savings accounts, 529 college savings plans and the refund value of a 529 prepaid tuition plan). **For a student who does not report parental information, the accounts owned by the student (and/or spouse) are reported as student investments.** For a student who must report parental information, the accounts reported as parental investments, including all accounts owned by the student and all accounts owned by the parent for any member of the household.

**Investments do not include** the home in which you live, unless a portion is rented, the value of life insurance, retirement plans (401K, pension funds, annuities, non-educational IRAs, Keogh plans, etc.) or cash, savings, checking reported separately.