UNIVERSITY OF NOTRE DAME
OFFICE OF FINANCIAL AID

ASSET CONFIRMATION WORKSHEET
(Independent Student)

Student's Name _____ NDid _____
Last First

STEP 1 – ASSETS	STUDENT & SPOUSE
Cash, savings, and checking accounts	$
Trust funds	$
Education savings accounts (e.g., Coverdell savings accounts, 529 college savings plans, refund value of 529 prepaid tuition plans, etc.)	$
Investments (e.g., UGMA, UTMA, money market funds, mutual funds, certificates of deposit, stock options, bonds, other securities, commodities, etc.). *Investments do not include the value of life insurance or retirement plans (e.g., 401[k], pension, annuities, non-education IRAs, Keogh plans, etc.). Investments also do not include an UGMA or UTMA for which you are the custodian, but not the owner.*	$

STEP 2 – PROPERTY & BUSINESSES		
Primary Residence ☐ Own ☐ Rent ☐ Other Monthly Mortgage / Rent $_____ Year Purchased: _____	Fair Market Value $	Mortgage Balance (include 2nd mortgage & home equity lines) $
Other Real Estate (attach separate document if more than 2 properties) Street Address City State Zip	Fair Market Value $	Mortgage Balance (include 2nd mortgage & home equity lines) $
Other Real Estate (attach separate document if more than 2 properties) Street Address City State Zip	Fair Market Value $	Mortgage Balance (include 2nd mortgage & home equity lines) $

Business/Farm	% of Ownership	% of Ownership by Other Family Members	# of Employees	Fair Market Value (your share)	Debt (your share)
☐ Sole Proprietorship				$	$
☐ Partnership (Form 1065)				$	$
☐ S Corporation (Form 1120S)				$	$
☐ C Corporation (Form 1120)				$	$
☐ Investment Farm				$	$

**Business/Farm value includes market value of land, buildings, machinery, equipment, inventory, etc.* (attach separate document if more space is required to report all businesses). *Investment farm does not include a family farm that you live on and operate.*

I certify that all of the information reported on this worksheet is complete and correct. The student and student's spouse (if applicable) must sign this worksheet. **Electronic signatures are not acceptable.**

Student Signature _____ Date_____

Spouse Signature _____ Date_____

Please submit the signed and completed form, along with supporting documentation, to the Office of Financial Aid via our secure document upload portal (go.nd.edu/fa-forms).