



UNIVERSITY OF
NOTRE DAME

OFFICE OF STUDENT FINANCIAL SERVICES
FINANCIAL AID

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**ASSET CONFIRMATION
WORKSHEET
(Dependent Student)**

Student's Name _____ NDId _____
Last First

The information you provide in this worksheet will be used to resolve conflicting information related to assets that were provided on the Free Application for Federal Student Aid (FAFSA), CSS/Financial Aid PROFILE, or other sources. Please report all applicable asset information for the parent(s) and student below, as of the date you filed the Free Application for Federal Student Aid (FAFSA). Please indicate \$0 in any field that does not apply.

STEP 1 FAMILY ASSETS	PARENT(S)	STUDENT
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.) for all children	\$	\$
Investments* (e.g., UGMA, UMTA, 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 PARENT(S) ASSETS	VALUE	DEBT
Primary Home <input type="checkbox"/> Own Monthly Mortgage \$ _____ <input type="checkbox"/> Rent Monthly Rent \$ _____ <input type="checkbox"/> Other Year Purchased	Fair Market Value \$	Mortgage Balance (include 2 nd mortgage & home equity lines) \$
Other Real Estate (Attach separate document if more than 2 properties) _____ Street _____ City State Zip	Fair Market Value \$	Mortgage Balance (include 2 nd mortgage & home equity lines) \$
Other Real Estate (Attach separate document if more than 2 properties) _____ Street _____ City State Zip	Fair Market Value \$	Mortgage Balance (include 2 nd mortgage & home equity lines) \$
Business/Farm* % ownership # of employees <input type="checkbox"/> Sole Proprietorship (Schedule C) _____ _____ <input type="checkbox"/> Partnership (Form 1065) _____ _____ <input type="checkbox"/> S Corporation (Form 1120S) _____ _____ <input type="checkbox"/> C Corporation (Form 1120) _____ _____ <input type="checkbox"/> 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 parent must sign this worksheet. Electronic signatures are not acceptable.

Student Signature _____ Date _____

Parent Signature _____ Date _____