

ASSET CONFIRMATION WORKSHEET (Independent Student)

Student's Name NDid First Last **STEP 1 – ASSETS STUDENT & SPOUSE** \$ Cash, savings, and checking accounts \$ **Child Support Received** \$ 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, noneducation 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** Own Rent Other Fair Market Value Mortgage Balance **Primary Residence** (include 2nd mortgage & home equity lines) Monthly Mortgage / Rent \$ Year Purchased: \$ \$ Fair Market Value Mortgage Balance Other Real Estate (attach separate document if more than 2 properties) (include 2nd mortgage & home equity lines) Street Address \$ Citv State Zip \$ Fair Market Value Mortgage Balance Other Real Estate (attach separate document if more than 2 properties) (include 2nd mortgage & home equity lines) Street Address City Zip State \$ \$ % of % of Ownership by # of Fair Market Value Debt **Business/Farm** Other Family Employees Ownership (your share) (your share) Members 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. **Original signatures required; 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).