UNIVERSITY OF NOTRE DAME

OFFICE OF STUDENT FINANCIAL SERVICES
FINANCIAL AID

ASSET CONFIRMATION WORKSHEET
(Independent Student)

Student's Name _____ NDid _____
Last First

The information provided 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) or other sources. Report all applicable asset information for the student and spouse (if applicable) below, as of the date you filed the FAFSA. Please indicate $0 in any field that does not apply.

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, 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 – PROPERTY & BUSINESSES

Primary Home ☐ 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 _____
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 _____
City State Zip

	Fair Market Value	Mortgage Balance (include 2nd mortgage & home equity lines)
	$	$

Business/Farm*	% ownership	# of employees	Fair Market Value (your share)	Debt (your share)
☐ Sole Proprietorship (Schedule C)			$	$
☐ 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 signed and completed form, along with supporting documentation, to the Office of Financial Aid. Contact information provided below for email (preferred method), fax, and mail.