



**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.). <i>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.</i>		\$ _____

STEP 2 – PROPERTY & BUSINESSES				
Primary Residence <input type="checkbox"/> Own <input type="checkbox"/> Rent <input type="checkbox"/> Other		Fair Market Value	Mortgage Balance (Include 2 nd mortgage & home equity lines)	
Monthly Mortgage / Rent \$ _____ Year Purchased: _____		\$ _____	\$ _____	
Other Real Estate (Attach Separate document if more than 2 properties)		Fair Market Value	Mortgage Balance (Include 2 nd mortgage & home equity lines)	
Street Address _____		\$ _____	\$ _____	
City _____ State _____ Zip _____				
Other Real Estate (Attach Separate document if more than 2 properties)				
Street Address _____		\$ _____	\$ _____	
City _____ State _____ Zip _____				
Business/Farm	% of Ownership			
<input type="checkbox"/> Sole Proprietorship			\$ _____	\$ _____
<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 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. Contact information provided below for email (preferred method) and mail.