



**ASSET CONFIRMATION  
WORKSHEET  
(Independent Student)**

Student's Name \_\_\_\_\_ NDId \_\_\_\_\_  
Last First

STEP 1 – ASSETS		STUDENT & SPOUSE
<b>Cash, savings, and checking accounts</b>		\$ _____
<b>Trust funds</b>		\$ _____
<b>Education savings accounts</b> (e.g., Coverdell savings accounts, 529 college savings plans, refund value of 529 prepaid tuition plans, etc.)		\$ _____
<b>Investments</b> (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				
<b>Primary Residence</b> <input type="checkbox"/> Own <input type="checkbox"/> Rent <input type="checkbox"/> Other		Fair Market Value	Mortgage Balance (Include 2 <sup>nd</sup> mortgage & home equity lines)	
Monthly Mortgage / Rent \$ _____ Year Purchased: _____		\$ _____	\$ _____	
<b>Other Real Estate</b> (Attach separate document if more than 2 properties)		Fair Market Value	Mortgage Balance (Include 2 <sup>nd</sup> mortgage & home equity lines)	
Street Address _____ City _____ State _____ Zip _____		\$ _____	\$ _____	
<b>Other Real Estate</b> (Attach separate document if more than 2 properties)		Fair Market Value	Mortgage Balance (Include 2 <sup>nd</sup> mortgage & home equity lines)	
Street Address _____ City _____ State _____ Zip _____		\$ _____	\$ _____	
<b>Business/Farm</b>	% of Ownership	# of Employees	Fair Market Value (your share)	Debt (your share)
<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.**