



## 2023–24 Asset Verification Request

Name \_\_\_\_\_ Student ID \_\_\_\_\_

Your 2023–24 Free Application for Federal Student Aid (FAFSA) was selected for a process called verification. To verify that you provided correct answers on the FAFSA, we will compare your answers with the information on this worksheet, and any other required documents. If there are differences, we may need to correct the information that was reported. Please complete and sign this worksheet, attaching any required documents, and continue to monitor Self-Service to avoid missing additional document requests. If you have any questions about verification, please contact our office to avoid processing delays.

A discrepancy exists on your Free Application for Federal Student Aid (FAFSA). To expedite the resolution of this conflict, please furnish the additional information requested. Your file will remain on hold until we can resolve these conflicts.

**A: Cash, Savings & Checking Accounts:**

	Custodial Parent(s) Assets - Include step-parent assets if included on the FAFSA	Student (& Spouse) Assets
<b>Total Value of Cash, Savings &amp; Checking Accounts</b>		

*A. Cash, Savings & Checking:* Include the balance of all cash, savings and checking accounts per the date you filed your initial FAFSA transaction for this academic year.

**B: Real Estate Investments:**

Property Address	Property Fair Market Value	Property Debt	% Rented if applicable

*B. Real Estate:* Include the properties listed on your 2021 Federal Tax Returns and any subsequently purchased properties. Fair Market Value can be documented by using real estate sites, such as zillow.com, or by a recent appraisal. Mortgage statements per the initial FAFSA filing date should be included. DO NOT include the home in which you live unless part of the home is rented. DO include vacation or second homes.

**C: Business Values:**

Business Name	% Ownership	% Ownership by other family members	Value	Debt

*C. Business Value:* DO NOT INCLUDE SCHEDULE C BUSINESSES. K1s are required for all partnerships and S-Corps. If not 51% or more owned by family, Federal Business Returns may be requested. The value and debt of the businesses are based on the percentage of ownership.

**D: Investment Value excluding real estate, businesses and retirement portfolios:**

Source	Value	Debt

*Copies of current balance statements should be included.*

*D. Investment Value:* Investments include Trust Funds (even if funds are restricted), money market funds, mutual funds, certificate of deposits, stocks, stock options, bonds, personal loans to businesses, other securities and installment or land sale contracts, commodities, etc. Investments do not include the home in which you live (unless a portion of the home is rented), the value of life insurance, retirement plans (401K, pension funds, annuities, non-educational IRAs, Keogh plans, etc.), or cash, savings and checking accounts already reported.

**D2: Educational Savings Plans:**

Type of Plan (529, UGMA, UTMA, Coverdell Savings)	Owner	Beneficiary	Amount

*D2. Educational Savings Plans:* Investments also included are qualified educational benefits or education savings accounts. For a student who does not report parental information, the accounts owned by the student (and/or spouse) are reported as student investments. For students who must report parental information, the accounts are reported as parental investments, including all accounts owned by the student and all accounts owned by the parent for any other member of household.

**Certification and Signatures**

I certify that all of the information reported on this worksheet is complete and accurate. **Note: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail or both.**

\_\_\_\_\_  
Student's signature (required) \_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's signature (required) \_\_\_\_\_  
Date

*Please mail, email, upload or fax this signed and dated worksheet to the Office of Undergraduate Financial Aid listed on the previous page.*