

Asset Confirmation Form

One or more of your selected institutions have requested additional clarification on asset values in order to further evaluate your financial aid. Please use this form to provide the full details of your assets as of the day you filed your FAFSA so your institution has a full understanding of your financial situation. For values that are not applicable to you below, enter 0, do not leave any fields blank. If the 'Business/Farm' and 'Other Real Estate' section do not apply to your situation, select 'Does not apply'.

Student's Full Name:

CBFinaidID:

Parent(s) listed below:

Personal & Investment Accounts	Student	Parent(s)
Cash, savings, and checking account(s)	\$	\$
Investments	\$	\$
Retirement account(s)	\$	\$
Trust funds	\$	\$
Other	\$	\$

Other Real Estate* <small>(Do not include primary residence)</small>		
<input type="checkbox"/> Does not apply Property Address: Street City State Zip	Who owns this property? <input type="checkbox"/> Parent(s) <input type="checkbox"/> Student Is this a multi-family dwelling? <input type="checkbox"/> Yes <input type="checkbox"/> No What percentage is a rental property?	Total Value: \$ (minus) Total Debt: \$ (equals) Net Worth: \$

**If you own additional real estate properties, attach a separate sheet including the relevant information for each property.*



Business/Farm*		
<input type="checkbox"/> Does not apply Name of Business or Farm: Your percent of ownership: Number of employees:	Who owns this property? <input type="checkbox"/> Parent(s) <input type="checkbox"/> Student Type: <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> S Corporation <input type="checkbox"/> C Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Farm	Total Value: \$ (minus) Total Debt: \$ (equals) Net Worth: \$

**If you own additional businesses or farms, attach a separate sheet including the relevant information for each property.*

By signing this I certify that the information documented above is true and I am willing to provide additional documentation if requested by the institution.

Student's Signature:

Date:

Parent(s) Signature (if applicable):

Date:



Reference Sheet

This page does not need to be submitted to IDOC

Cash, savings, and checking account(s): List the balance of the student's or parent('s) cash, checking, and savings accounts as of the date the FAFSA was filed.

Other Real Estate value: The current market value of your property.

Other Real Estate debt: The current debt owed on the listed property only.

Business/Farm value: The current market value of all land, buildings, and inventory of the indicated business.

Business/Farm debt: The current value of debt for which the business was used as collateral.

Investments include stocks, stock options, bonds, mutual funds, securities, certificates of deposit (CDs), money market funds, 529 college savings plans for the student, and Coverdell savings accounts.

Investments do not include primary residence, other real estate, the value of life insurance, retirement plans (401(k) or 403(b) plans, pension funds, annuities, non-education IRA's, Keogh plans, etc.), and 529 plans for other children.

Trust funds: Include any UGMA or UTMA accounts if applicable

Retirement accounts: Include tax sheltered accounts, such as 401(k), 403(b) plans, pension funds, annuities, IRAs, Keogh plans