

## 2023 - 2024 Asset Verification Worksheet

**STUDENT INFORMATION**

PLEASE PRINT: Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Student ID Number \_\_\_\_\_

The asset information reported on your FAFSA is inconsistent with the information on the 2021 federal income tax return submitted to this office. Please complete all requested sections below.

If an item(s) does not pertain to you/your parent(s), please mark the item as N/A (Not Applicable). All reported figures should reflect values as of the date you submitted your FAFSA.

**ASSET INFORMATION – as of the date you submitted your FAFSA**

**SAVINGS:** The amount reported for all cash, savings and checking accounts has been changed or you are appealing to have that amount changed from the original dollar figure reported on your FAFSA. List the total amount in all cash, savings, and checking accounts and attach copies of all bank statements.

Student \$ \_\_\_\_\_ Parent(s) \$ \_\_\_\_\_

**INVESTMENT:** List the total market value of all investments including trust funds, money market funds, certificates of deposit, stocks, bonds and other securities, commodities and precious metals.

Student \$ \_\_\_\_\_ Parent(s) \$ \_\_\_\_\_

**HOME:** Is your permanent home a multi-family dwelling? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, how many units are in the building? \_\_\_\_\_ How many units does your family occupy? \_\_\_\_\_

List the market value as of the FAFSA filing date (do not use the assessed, insured or tax value):

- Student's property: Market value: \$ \_\_\_\_\_ Principal balance of mortgage owed: \$ \_\_\_\_\_
- Parent(s)' property: Market value: \$ \_\_\_\_\_ Principal balance of mortgage owed: \$ \_\_\_\_\_

Has this property been sold since the 2020 tax returns were filed? If so, when? \_\_\_\_\_

**AIB:** Your tax return reflects income or loss from other real estate or investment property (not your permanent home).

Property Address: \_\_\_\_\_  
Street
Town
State

List the market value as of the FAFSA filing date (do not use the assessed, insured or tax value):

Student's: Market value: \$ \_\_\_\_\_ Principal balance of mortgage owed: \$ \_\_\_\_\_  
 Parent(s)': Market value: \$ \_\_\_\_\_ Principal balance of mortgage owed: \$ \_\_\_\_\_

Has this property been sold since the 2020 tax returns were filed? If so, when? \_\_\_\_\_

\_\_\_\_\_  
Student signature \_\_\_\_\_  
Date

\_\_\_\_\_  
Parent signature \_\_\_\_\_  
Date