



2023-2024 Asset Clarification Form

Name of Student _____

Year of Graduation _____

College Board FinAid ID _____

In reviewing your application for financial aid, we discovered that additional clarification is needed for your reported assets and investments. Please complete this form in its entirety using information accurate **as of the initial filing date of your FAFSA**. If a section does not apply, enter zeros or "N/A" where appropriate.

Personal and Investment Accounts	Parent(s)	Student
Value of cash, savings, and checking account(s)		
Value of investments*		

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

Investments **DO NOT** include primary residence, life insurance, or retirement plans (401K plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.).

Real Estate		
DO NOT include primary residence unless it is a multi-family dwelling. If debt is higher than value, include a written explanation.		
Property Address: _____ Street _____ City State Zip	Who owns this property? Parent(s) Student Is this a multi-family dwelling? Yes No If yes, percentage that is rental property: _____%	Total Value: \$ _____ (minus) Total Debt: \$ _____ (equals) Net Worth: \$ _____
Property Address: _____ Street _____ City State Zip	Who owns this property? Parent(s) Student Is this a multi-family dwelling? Yes No If yes, percentage that is rental property: _____%	Total Value: \$ _____ (minus) Total Debt: \$ _____ (equals) Net Worth: \$ _____

Real Estate (continued)		
Property Address: <hr/> Street <hr/> City State Zip	Who owns this property? Parent(s) Student	Total Value: \$ _____ <i>(minus)</i>
	Is this a multi-family dwelling? Yes No	Total Debt: \$ _____ <i>(equals)</i>
	If yes, percentage that is rental property: _____ %	Net Worth: \$ _____
Property Address: <hr/> Street <hr/> City State Zip	Who owns this property? Parent(s) Student	Total Value: \$ _____ <i>(minus)</i>
	Is this a multi-family dwelling? Yes No	Total Debt: \$ _____ <i>(equals)</i>
	If yes, percentage that is rental property: _____ %	Net Worth: \$ _____

There are other properties that I was unable to list on this form. Yes No

If yes, I have attached a separate sheet listing these properties and the requested information. Yes No

I (we) hereby swear or affirm that the information reported on this form is true, complete, and accurate to the best of my knowledge. I understand that any false statement or misrepresentation will be cause for denial, reduction, withdrawal, and/or repayment of financial aid.

_____ Date

_____ Date