

**ASIR**

**Asset Information Request Form  
2017-2018**

PURPOSE OF FORM

Generally, the Asset Information Request Form is requested to clarify a discrepancy in asset values reported on the Free Application for Federal Student Aid (FAFSA) and CSS/PROFILE. This form may also be requested to collect asset values that may not have been reported on an application.

GENERAL INSTRUCTIONS

If you are dependent for financial aid purposes and are required to report parent information, enter values under the Dependent Student heading when provided with this option. If you are independent for financial aid purposes, enter values under the Independent Student heading when provided with this option.

All assets, including those held in countries other than the United States, should be reported in U.S. dollars. Please report values **as of the date you filed your initial 2017-2018 FAFSA**. If additional room is needed, please attach separate pages. Do not leave any lines blank. Enter zero or 'N/A' if a line does not apply.

Section 2: Investments

Do not report the value of qualified retirement investments such as 401(k), 403(b), IRA, or Keogh accounts. Please note that **Uniform Trust/Uniform Gifts to Minors (UTMA/UGMA)** are considered a student asset and the value should be reported in the student column. Be sure to include values for Series EE savings bonds under "Bonds, Savings Bonds, Education Bonds".

Section 4: Other Real Estate

Do not report the value of your primary residence. Primary residence is defined as the home in which your parents (or you, if independent) currently live. Generally, present market value is the true, underlying value of the property.

Section 5: Business Assets

The definition of family for this section includes: (1) person directly related to you, such as a parent, sister or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law.

Section 7: Trust Funds

Trust funds must be reported even if the beneficiary's access is restricted or if proceeds or distributions of the trust will not be received during the award year. If the trust is restricted by court-order for specific expenses (such as to pay for future surgery for the victim of a car accident), you must submit court documentation to verify the restriction. Please review the Trust Information Form on our website for detailed information.

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Student Financial Services may request third-party documentation to confirm the values you report on your Asset Information Request Form. Should you submit a form with incorrect information, you must also submit third-party documentation to confirm the correct values. Adjustments to a financial aid award as a result of submitting documentation to correct an Asset Information Request form are neither guaranteed nor immediate.

Forms received without the appropriate signature(s) or with missing information or missing pages are considered incomplete and must be resubmitted. This will delay the evaluation of your financial aid eligibility and the awarding of your financial aid.

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Student's University ID:     -     or SIS ID:

Student's Full Name: \_\_\_\_\_  
(LEGAL NAME - PRINT)                      first                      middle                      last

**REPORT ALL VALUES AS OF YOUR FAFSA FILING DATE AND IN U.S. DOLLARS**

**SECTION 1: CASH, SAVINGS AND CHECKING ACCOUNTS**

List the value of all cash on hand, as well as savings and checking account totals.				
Please report values for each applicable family member:	Dependent Student		Independent Student	
	Parent(s)	Student	Student	Spouse
Cash Balance				
Checking Account Balance				
Savings Account Balance				
<b>TOTAL</b>				

**SECTION 2: INVESTMENTS**

<i>Do not include qualified retirement investments such as 401(k), 403(b), IRA, or Keogh accounts.</i>				
Please report values for each applicable family member:	Dependent Student		Independent Student	
	Parent(s)	Student	Student	Spouse
Trust Funds (see Section 7 below)				
Uniform Trust/Uniform Gifts to Minors				
Stocks, Stock Options, Mutual Funds				
Bonds, Savings Bonds, Education Bonds				
Money Market Funds				
Certificate of Deposits (CDs)				
Non-qualified (non-retirement) Annuities				
Commodities				
Installment and Land Sale Contracts				
Other Investments (not listed above)				
<b>TOTAL</b>				

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**SECTION 3: EDUCATION BENEFITS & COLLEGE SAVINGS PLANS**

For a dependent student, the accounts are reported as parental investments. This includes all accounts owned by the parents for any member of the household. For an independent student, report the accounts owned by the student (and/or the student's spouse).

Please report values for each applicable family member:	Dependent Student		Independent Student	
	VALUE	OWNER(S) OF ACCOUNT	VALUE	OWNER(S) OF ACCOUNT
Education Savings Account: value for student and all members of the household. Specify type:				
529 Prepaid Tuition Plan (refund value): value for student and all other members of the household				

**SECTION 4: OTHER REAL ESTATE**

**Do not include the primary residence in which you live.** If a property is jointly owned, ONLY report the value and debt for the portion owned by the parent(s) and student if dependent; or if independent, the student and spouse.

For "TAX ASSESSED VALUE" please report the value from the appropriate jurisdiction's most current tax assessment statement.

PROPERTY ADDRESS	TAX ASSESSED VALUE	PRESENT MARKET VALUE	DEBT OR PRINCIPAL OWED	WHO OWNS THE PROPERTY?

**Add additional entries on a separate page if necessary.**

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**SECTION 5: BUSINESS ASSETS**

Business present market value includes the market value of land, buildings, machinery, equipment, inventory, etc. Business debt or principal owed means only those debts for which the business was used as collateral. If a business is jointly owned, ONLY list the value and the debt for the portion owned by the parent(s) and student if dependent; or if independent, the student and spouse. *\*See instructions for the definition of family for this section.*

BUSINESS NAME	PRESENT MARKET VALUE	DEBT OR PRINCIPAL OWED	WHO OWNS THE BUSINESS?	
<b>1.</b>				
Does your family* own and control more than 50% of the above business?			<input type="checkbox"/> Yes	<input type="checkbox"/> No
Number of employees at the above business?				
<b>2.</b>				
Does your family* own and control more than 50% of the above business?			<input type="checkbox"/> Yes	<input type="checkbox"/> No
Number of employees at the above business?				
<b>Add additional entries on a separate page if necessary.</b>				

**SECTION 6: FARM ASSETS**

Farm present market value includes the market value of land, livestock, buildings, machinery, equipment, inventory, etc. Farm debt or principal owed means only those debts for which the farm was used as collateral. If a farm is jointly owned, ONLY list the value and the debt for the portion owned by the parent(s) and student if dependent; or if independent, the student and spouse.

FARM NAME	PRESENT MARKET VALUE	DEBT OR PRINCIPAL OWED	WHO OWNS THE FARM?	
<b>1.</b>				
Does your family (you and/or your parents) live on the above farm?			<input type="checkbox"/> Yes	<input type="checkbox"/> No
Does your family (you and/or your parents) materially participate in the farm operations?			<input type="checkbox"/> Yes	<input type="checkbox"/> No
<b>2.</b>				
Does your family (you and/or your parents) live on the above farm?			<input type="checkbox"/> Yes	<input type="checkbox"/> No
Does your family (you and/or your parents) materially participate in the farm operations?			<input type="checkbox"/> Yes	<input type="checkbox"/> No
<b>Add additional entries on a separate page if necessary.</b>				

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**SECTION 7: TRUST FUNDS**

If you mark "yes" to either question below, additional information must be submitted to our office. Please review the Trust Information Form at <a href="http://sfs.virginia.edu/forms">http://sfs.virginia.edu/forms</a> for more details.		
Do you (the student) and/or spouse (if applicable) have a trust?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do your parents have a trust?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**SECTION 8: EXPLANATION FOR DISCREPANCY IN VALUES**

If you were asked to complete this form because of a discrepancy in asset values reported on the FAFSA and the CSS/PROFILE or other document, please provide your explanation of the asset discrepancy below. Attach additional pages if necessary.

**CERTIFICATION STATEMENT:** I certify that all the information reported to qualify for federal aid is complete and correct to my knowledge. If additional documentation is required, I will submit those documents in a timely manner. I understand that if I purposely give false or misleading information, I may be fined, sentenced to jail, or both and my financial aid may be terminated.

STUDENT SIGNATURE \_\_\_\_\_ Date \_\_\_\_\_

PARENT SIGNATURE \_\_\_\_\_ Date \_\_\_\_\_  
 (Required for dependent students only)