



ASIR **Asset Confirmation Request Form**
2023-2024

Student's University ID: - or SIS ID:

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

The Asset Confirmation Request Form confirms asset values reported on the FAFSA and/or collects values that may not have been reported on the FAFSA. **All asset values must be reported in U.S. dollars as of the date you filed your initial 2023-2024 FAFSA.** Attach additional pages, if necessary, for other real estate, businesses, and/or farms if those sections apply. **Please write legibly and complete the *dependent-* or *independent-*student columns below, as applicable.**

Student Financial Services may request third-party documentation to confirm reported values. Forms received without signature(s) or missing information or pages are considered incomplete. **Please leave no blanks – enter “0” or “N/A,” if appropriate.** Missing or incomplete information will delay the evaluation of your financial aid eligibility.

CASH, SAVINGS, AND CHECKING ACCOUNTS:

Please report values for each applicable family member:	<i>Dependent Student</i>		<i>Independent Student</i>	
	Parent(s)	Student	Student	Spouse
Cash/Checking/Savings TOTAL				

RETIREMENT ACCOUNTS: Only include *qualified* retirement savings in this section. We request this information only to ensure that retirement assets are not inadvertently included in overall assets reported on the FAFSA. Savings in dedicated retirement accounts will *not* be included when determining your financial aid award.

Please report values for each applicable family member:	<i>Dependent Student</i>		<i>Independent Student</i>	
	Parent(s)	Student	Student	Spouse
401(k), 403(b), pension funds, annuities				
IRA, SEP, Keogh, other				
TOTAL RETIREMENT				



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INVESTMENTS: Do not include amounts reported on the previous page as qualified retirement savings.

Please report values for each applicable family member:	Dependent Student		Independent Student	
	Parent(s)	Student	Student	Spouse
Money Market/ Certificate of Deposit (CD) account value				
Stocks, Bonds, Mutual Funds value				
Foreign asset/bank account value				
Trust value where student or parent or student's spouse is a beneficiary*				
Installment and land sale contract value				
Other investments: example Cryptocurrency, commodities				
TOTAL				

**We may request trust documentation to confirm the terms of the trust.*

EDUCATION SAVINGS PLANS:

Do you or your family have any educational savings plans? If "no", you may skip this section.	<input type="checkbox"/> Yes		<input type="checkbox"/> No	
	<i>Dependent students: education accounts for any household member are reported as parent investments.</i>		<i>Independent students: only report accounts owned by student or spouse</i>	
Please report values for each applicable family member:	Dependent Student		Independent Student	
	VALUE	OWNER(S) OF ACCOUNT	VALUE	OWNER(S) OF ACCOUNT
529 Prepaid Tuition Plan (refund value) and/or 529 Education Savings Plan, and/or COVERDELL Education Savings Account for student AND siblings (or student AND spouse)				
UTMA/UGMA (generally the student is the owner of this type of account)				



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OTHER REAL ESTATE: Do not include primary residence in which you/your parents (or you/your spouse) live.

Table with 5 columns: Do you or your parent(s)/your spouse own other real estate either in the US or in another country/territory? If "no", you may skip this section. FULL PROPERTY ADDRESS, TAX ASSESSED VALUE, CURRENT MARKET VALUE, DEBT OWED ON PROPERTY, WHO OWNS THE PROPERTY.

FARM ASSETS:

Table with 4 columns: FARM NAME, CURRENT MARKET VALUE, DEBT OWED AGAINST FARM, WHO OWNS THE FARM? Includes questions about living on the farm and participating in operations.

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BUSINESS ASSETS:

Current market value of business includes the market value of land, buildings, machinery, equipment, inventory, etc. If a business is jointly owned, **ONLY** list the value and the debt for the portion owned by the parent(s) and/or student, if student is *dependent*, or by the student and spouse, if *independent*.

Do you or your parent(s)/your spouse own any portion of any business in the US or in another country/territory? If "no", you may skip this section.		<input type="checkbox"/> Yes		<input type="checkbox"/> No	
BUSINESS NAME Attach additional pages if necessary		CURRENT MARKET VALUE OF BUSINESS	DEBT AGAINST BUSINESS	WHO OWNS BUSINESS?	
1.					
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?					
2.					
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?					
3.					
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?					
4.					
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?					

***Family includes persons directly related to you, such as a parent, sister/brother, or cousin. Family also includes persons who are or were related to you by marriage such as a spouse, stepparent, or brother/sister-in-law.**



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ADDITIONAL INFORMATION

In the box below, please add any additional information necessary to explain asset-related issues only. Feel free to attach any supplemental materials as well.

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 face legal consequences and my financial aid may be terminated.

STUDENT SIGNATURE _____ Date _____

PARENT SIGNATURE _____ Date _____

(Required for dependent students only)