



Financial Aid Services  
 100 Morrissey Blvd.  
 Boston, MA 02125-3393  
 617.287.6300  
 Fax: 617.287.6323  
 finaid@umb.edu

## ASSET CONFIRMATION -- INDEPENDENT STUDENT

<b>Name</b> _____	<b>SSN</b> _____
<b>Address</b> _____	<b>Student ID</b> _____
<b>City, State, ZIP</b> _____	<b>Date of Birth</b> _____
<b>Email</b> _____	<b>Phone</b> _____

Your application for financial assistance for 2009-2010 is incomplete pending confirmation of assets. Please complete and return this worksheet so that processing of your application may continue. Include information for yourself and for your spouse, if you are married. Valuations should be reported as the full fair market value as of the day you completed the FAFSA. Debts should include any outstanding mortgages or loans on the asset listed.

Do **NOT** include the values of the following items: debts not related to assets listed, the balance of any personal or consumer debt, life insurance policies, retirement plans (IRA, pension funds, annuities), a family farm (if it is your principal residence and you participate in the operation), or student financial aid.

**Cash, Savings, Checking:** *include the current balance of cash, savings, and checking accounts.* Value: \$ \_\_\_\_\_

**Investments:** *trust funds, money market funds, mutual funds, certificates of deposit, stocks, bonds, other securities, the value of installment and land sale contracts, commodities, precious and strategic metals, etc. Do NOT include your primary residence.* Value: \$ \_\_\_\_\_  
 Debt: \$ \_\_\_\_\_

**Owner-occupied Rental Real Estate:** *If you own a multi-family real estate building or complex and reside in one of the units, report the value of the entire complex and note the number of units within the building or complex: \_\_\_\_\_.* Value: \$ \_\_\_\_\_  
 Debt: \$ \_\_\_\_\_

**Real Estate:** *If you own real estate that is not your primary residence, report today's value. Other real estate includes rental property, land, second homes, summer homes, hobby farms, investment farms. Do NOT include your primary residence.* Value: \$ \_\_\_\_\_  
 Debt: \$ \_\_\_\_\_

**Business:** *Report the value of the business; include the value of land, buildings, machinery, equipment, inventories, etc Do NOT include a business owned in full by the student (and spouse, if applicable) that has less than 100 full time (or equivalent) employees.* Value: \$ \_\_\_\_\_  
 Debt: \$ \_\_\_\_\_

### CERTIFICATION

*By signing this form, I certify all information reported on this form and within the enclosed documentation is complete and correct. I understand that providing false or misleading information may result in a \$10,000 fine, a prison sentence, or both, according to the Higher Education Act of 1965, as amended, Section 490(a). Any false or misleading information is subject to cancellation of all Federal financial assistance.*

_____	_____
<i>Student Signature</i>	<i>Date</i>
_____	_____
<i>Spouse Signature</i>	<i>Date</i>

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**