

## ASSET INFORMATION CLARIFICATION 2023-2024

Office of Student Financial Assistance

<b>Student's Name:</b>	<b>ID Number:</b>
<p style="text-align: center;"><b><u>What to Include</u></b></p> <ul style="list-style-type: none"> <li>We need additional information before we can complete your financial aid verification</li> <li>Use figures as of the date your original Free Application for Student Aid (FAFSA) was filed</li> <li>Round figures to the nearest dollar</li> </ul>	<p style="text-align: center;"><b><u>Do NOT Include</u></b></p> <ul style="list-style-type: none"> <li><b>Blank spaces. If a question/statement does not apply, write in "0."</b></li> <li>Do not include personal or consumer loans or any debts that are not related to the assets listed; the value of retirement plans (pension funds, annuities, IRAs, KEOGH plans, etc.); student financial aid; or your primary residence</li> </ul>

**Certification Statement**  
*I certify that the information I am providing is true, complete, and correct to the best of my knowledge.*

**Student's Signature** \_\_\_\_\_ **Date:** \_\_\_\_\_  
NOTE: Signature must be handwritten or user-generated. Computer fonts not acceptable.

**Parent's Signature** \_\_\_\_\_ **Date:** \_\_\_\_\_  
NOTE: Signature must be handwritten or user-generated. Computer fonts not acceptable.

<b>Assets</b> Do not leave any questions blank. Enter "0" if N/A	<b>Student Amount</b> (All Students)	<b>Parent Amount</b> (if parent information required on FAFSA)
<p style="text-align: center;"><b>Cash, Savings, and Checking Accounts</b></p> <p>Enter total balance of cash, savings, and checking accounts <b>as of the date your original FAFSA was filed.</b> Do not enter average monthly balances.</p>	\$	\$
<p style="text-align: center;"><b>Other Real Estate Value (not your primary residence)</b></p> <p>Enter the total market value* of other real estate (include rental property, land, second or summer homes) as of the date the FAFSA was completed. Please list properties on a separate sheet. *Market value is total value minus debt. Refer to recent property tax assessments and mortgage statements.</p>	\$	\$
<p style="text-align: center;"><b>Investment Value</b></p> <p>Enter the total market value of investments as of the date you filed the FAFSA. <u>Examples include:</u> trust funds, money market funds, mutual funds, certificates of deposit, stock, stock options, bonds, savings bonds and other securities, Coverdell savings accounts (education IRAs), 529 and other college savings plans, the refund value of 529 state prepaid tuition plans, installment and land sale contracts (including mortgages held), commodities, precious and strategic metals, etc. <b>*Market value is total value minus debt. Do not include IRAs, pension plans, or other retirement accounts.</b></p>	\$	\$
<p style="text-align: center;"><b>Business Value</b></p> <p>Only include the total market value as of the day you filed the FAFSA. Include the market value of land, buildings, machinery, equipment, inventories, etc. <b>Do not</b> include the value of your home even if it is part of the business. *Market value is total value minus debt.</p> <p><b>Does your business have more than 100 Full-Time Employees?</b>    Yes                  No</p>	\$	\$
<p style="text-align: center;"><b>Investment Farm Value</b></p> <p>Indicate the total market value of the farm as of the date you filed the FAFSA. Include the market value of land, buildings, machinery, equipment, livestock, inventories, etc. <b>Do not</b> report the farm as an investment if it is the principal place of residence for you and your family, and you or your parents (if dependent) materially participated in the farming operation. (This is typically indicated by a Schedule F and included on line E of the 1040. <b>*Market value is total value minus debt.</b></p>	\$	\$

**Do not leave any of the above questions blank. If a question does not apply, write in a "0."**

**USE ONE OF THE FOLLOWING METHODS TO RETURN THIS FORM:**

MAIL or IN-PERSON	FAX	EMAIL
The Catholic University of America 620 Michigan Avenue NE, M300 Father O'Connell Hall Washington, DC 20064	202-319-5573	cua-faforms@cua.edu