



University of Massachusetts Lowell  
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## 2008-2009 CONFIRMATION OF ASSETS WORKSHEET

**Student Name:** \_\_\_\_\_

**Student ID:** \_\_\_\_\_

Your application for financial assistance for 2008- 2009 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 your parents. Values should be reported as the full fair market value of the asset 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 or debts 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), and any student financial aid.

|  | <b>Student (Spouse)</b>           | <b>Parent</b>                     |
|--|-----------------------------------|-----------------------------------|
| <b>Cash, Savings, Checking:</b> <i>include the current balance of cash, savings, and checking accounts.</i>  | Value: \$ _____                   | Value: \$ _____                   |
| <b>Investments:</b> <i>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 .</i> | Value: \$ _____<br>Debt: \$ _____ | Value: \$ _____<br>Debt: \$ _____ |
| <b>Owner occupied Rental Real Estate:</b> <i>If you own a multifamily real estate building or complex and reside in one of the units, report the value of the entire complex <b>and</b> note the number of units within the building or complex: _____.</i>                    | Value: \$ _____<br>Debt: \$ _____ | Value: \$ _____<br>Debt: \$ _____ |
| <b>Real Estate:</b> <i>If you own real estate that is not your primary residence, report the value. Other real estate includes rental property, land, second homes, summer homes, hobby farms, investment farms. Do NOT include your primary residence.</i>                    | Value: \$ _____<br>Debt: \$ _____ | Value: \$ _____<br>Debt: \$ _____ |
| <b>Business:</b> <i>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's family that has less than 100 full time (or equivalent) employees.</i>             | Value: \$ _____<br>Debt: \$ _____ | Value: \$ _____<br>Debt: \$ _____ |

### CERTIFICATION

*By signing this form, I certify all information reported on this form and within the enclosed documentation is complete and correct. I (we) 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*

\_\_\_\_\_  
**Student Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Parent Signature**

\_\_\_\_\_  
**Date**