



# ASSUMPTION COLLEGE

WORCESTER, MASSACHUSETTS | ROME, ITALY

Office of Financial Aid  
500 Salisbury Street  
Worcester, MA 01609  
Phone: (508) 767-7158  
Fax: (508) 519-1286  
Email: fa@assumption.edu

## 2019-2020 ASSET CLARIFICATION FORM – DEPENDENT STUDENT

Student Name: \_\_\_\_\_ Student ID#: \_\_\_\_\_

The asset information you provided on your 2019-20 FAFSA requires clarification. Please complete this form using asset information as of the date you filed your 2019-20 FAFSA.

PERSONAL & INVESTMENT ACCOUNTS	
Value of Cash, Savings, Checking Account(s): Student: \$ _____ Parent: \$ _____	<b>Investments include</b> stocks, stock options, bonds, mutual funds, securities, certificates of deposit (CDs), money market funds, trust funds, 529 college savings plans, and Coverdell savings accounts.
Value of Investments: Student: \$ _____ Parent: \$ _____	<b>Investments do not include</b> primary residence, the value of life insurance, retirement plans (401K plans, pension funds, annuities, non-education IRA's, Keogh plans, etc.) or UGMA and UTMA accounts.

REAL ESTATE <i>Real estate includes rental property, land, and second or summer homes. Do not include the home you live in unless it is a multi-family dwelling</i>		
<b>Property Address:</b> _____ Street _____ City State Zip	<b>Multi-family dwelling?</b> <input type="radio"/> Yes <input type="radio"/> No If yes, percentage that is rental property: _____%	<b>Total Value:</b> \$ _____ <i>(minus)</i> <b>Total Debt:</b> \$ _____ <i>(equals)</i> <b>Net Worth:</b> \$ _____
<b>Property Address:</b> _____ Street _____ City State Zip	<b>Multi-family dwelling?</b> <input type="radio"/> Yes <input type="radio"/> No If yes, percentage that is rental property: _____%	<b>Total Value:</b> \$ _____ <i>(minus)</i> <b>Total Debt:</b> \$ _____ <i>(equals)</i> <b>Net Worth:</b> \$ _____

BUSINESS/FARM <i>Business/Farm value includes the market value of land, buildings, machinery, equipment and inventory. The debts used to determine total business debt include only those for which the business/farm was used as collateral.</i>		
<b>Name of Business/Farm:</b> _____ Your % of Ownership: _____% Number of Employees: _____ List the name(s) of owners/partners, relationship to parent(s) and % of ownership: _____ _____	<b>Type:</b> <input type="radio"/> Sole Proprietorship <input type="radio"/> S Corporation <input type="radio"/> C Corporation <input type="radio"/> Partnership <input type="radio"/> Farm	<b>Total Value:</b> \$ _____ <i>(minus)</i> <b>Total Debt:</b> \$ _____ <i>(equals)</i> <b>Net Worth:</b> \$ _____

By signing\* this form, each person certifies that all the information reported is correct and complete.

\_\_\_\_\_  
Student Date

\_\_\_\_\_  
Parent Date

\*We are not able to accept electronic signatures.