



VILLANOVA UNIVERSITY

2022-2023 Asset Confirmation Worksheet

Please Return To:

Office of Financial Assistance Dropbox
<https://www1.villanova.edu/villanova/enroll/finaid/forms.html>

Student's Name: _____ Villanova University Student ID Number: _____

The information provided on this worksheet, along with supporting documentation, will be used by our office to resolve conflicting information related to assets that were provided on the Free Application for Federal Student Aid (FAFSA), and the CSS Profile. Please report all applicable asset information for the parent(s)/stepparent and student below, as of the date you filed the FAFSA.

Please indicate \$0 in any field that does not apply to you – Do Not Leave Blank. If additional clarification is needed, we reserve the right to request additional documentation, including copies of bank and/or brokerage statements from each account listed on this form.

Investments include trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stock, stock options, bonds, other securities, installment and land sale contracts (including mortgages held, commodities, etc.)

Investments also include qualified educational benefits or education savings accounts (i.e. Coverdall savings account, 529 college savings plans and the refund value of 529 prepaid tuition plans). For a student who does not report parental information, the accounts owned by the student (and/or the student's spouse) are reported as student's investments. **For a student who must report parental information, the accounts are reported as parental investments, including all accounts owned by the student and all account owned by the parents for any member in the household.**

Investments do NOT include the value of life insurance, retirement plans (401k, pension funds, annuities, non- education IRAs, KEOGH plans, etc.). Investments also do not include an UGMA or UTMA for which you are the custodian, but not the owner.

Do Not Leave Blank and List the Amounts Based on the Date You Submitted the FAFSA.

CASH, SAVINGS, AND CHECKING ACCOUNTS	PARENT(S)	STUDENT
Cash on Hand	\$	\$
Savings Account	\$	\$
Checking Account	\$	\$
TOTAL	\$	\$

INVESTMENTS	PARENT(S)	STUDENT
Trust Funds	\$	\$
Uniform Trust/Uniform Gift to Minors (UTMA/UGMA)	\$	\$
Stock, Stock Options, Mutual Funds	\$	\$
Bonds, Savings Bonds, Education Bonds	\$	\$
Money Market Funds	\$	\$
Certificate of Deposits (CDs)	\$	\$
Non-qualified (non-retirement) Annuities	\$	\$
Installment and Land Sale Contracts	\$	\$
TOTAL	\$	\$

****MUST COMPLETE ADDITIONAL INFORMATION ON THE NEXT PAGE****

