



2024-2025 Asset Information - Student

Please use black or blue ink while filling out this form.

Documentation may be required. Documents submitted become part of the aid file and cannot be returned. **If the dollar amount for a section is 0, enter 0; do not leave blank.**

Student Name _____

LMU ID

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The figures you report below should reflect values as of the date the FAFSA was submitted. (If you do not know this date, you may call FAFSA at 1-800-4-FED-AID.)

| Asset Type | Value | |
|---|----------------------|---------------------|
| Cash, savings, and checking accounts: | \$ | |
| Trust Fund (s): | \$ | |
| Total of other Investments : <small>Include money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, qualified educational benefits or education savings accounts (e.g. 529 prepaid tuition plans). Do not include the home you live in, the value of life insurance, retirement plans, (e.g. 401[K] plans or pension funds) or cash, savings and checking accounts already reported above.</small> | \$ | |
| Other Real Estate Value: <small>If you own multiple properties, please attach a separate document with the current value and debt for each. Note: If you own percentage of a property, include only your percentage of the value and debt. (Do not include the home in which you live.)</small> | Current Value | Current Debt |
| | \$ | \$ |
| Business Value: <small>If you do not own 100 % of the business, report the value and debt that apply to your percentage of ownership. Do not report the value or debt of any business that employs <u>less than 100 people</u>.</small> | \$ | \$ |
| Farm Value: <small>If you do not own 100 % of the farm, report the value and debt that apply to your percentage of ownership.</small> | \$ | \$ |

The individual signing below certifies that the information provided on this form is true and accurate to the best of their knowledge. Providing false or misleading information may result in a referral to the U.S. Department of Education where you may be fined, sent to prison or both.

Student Signature: _____

Date: _____

Print Form

**Mail: LMU Financial Aid
1 LMU Drive, Suite 270
Los Angeles, CA 90045**

**Phone: 310.338.2753
Fax: 310.338.2793**
(include number of pages submitted on fax cover page)

How to Submit this Form:

The Department of Education requires that documents containing personally identifiable information (PII) must be transmitted through secure means. This form cannot be submitted via email. You may mail or fax this form to the address or fax number listed to the left, or you may submit it as a PDF through our Secure Upload page available at financialaid.lmu.edu/upload

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| <p>For Office Use Only: RRAAREQ - ASSETS at R Etrieve - Student Asset Info Form</p> <p>FAO Staff Initial _____ Date: _____</p> |
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