

**2018-2019 Asset Information - Parent**

Documentation is required. Please include copies of your most recent account statements.

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

**Student Last Name** \_\_\_\_\_

LMU ID

**Student First Name** \_\_\_\_\_

Asset Type	Value	
Cash, savings, and checking accounts (as of today):	\$ _____	
Trust Fund (s):	\$ _____	
<b>Total of other Investments</b> : Include UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, qualified educational benefits or education savings accounts (e.g., Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans). Investments do not include the home you live in, the value of life insurance, retirement plans, (401[K] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings and checking accounts already reported in questions 40 and 88.	\$ _____	
	<b>Current Value</b>	<b>Current Debt</b>
<b>Other Real Estate:</b> If you own multiple properties please attach a separate document with the value, debt, purchase price and purchase year for each. Note: If you own percentage of a property, include only your percentage of the value and debt. <b>(Do not include the home in which you live.)</b>	\$ _____	\$ _____
Year Purchased:	_____	Year
Purchase Price:	\$ _____	
<b>Business:</b> If you do not own 100 % of the business, report the worth and debt that apply to your percentage of the business.	\$ _____	\$ _____
Does the business have less than 100 employees?	_____	
<b>Farm:</b> If you do not own 100 % of the farm, report the worth and debt that apply to your percentage of the farm.	\$ _____	\$ _____

I, \_\_\_\_\_ certify the above is true and correct.

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

Date \_\_\_\_\_

**How to Submit this Form:**

**Mail: LMU Financial Aid Office  
 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)

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](http://financialaid.lmu.edu/upload)

For Office Use Only: RRAAREQ - ASSETP at R Nolij - Parent Asset Information  FAO Staff Initial _____ Date: _____
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