

2018-2019 Asset Information - Student

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):	\$ _____	
Total of other Investments : 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.	\$ _____	
	Current Value	Current Debt
Other Real Estate: 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. (Do not include the home in which you live.)	\$ _____	\$ _____
Year Purchased:	_____	Year
Purchase Price:	\$ _____	
Business: 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?	_____	
Farm: If you do not own 100 % of the farm, report the worth and debt that apply to your percentage of the farm.	\$ _____	\$ _____

Federal law does not allow us to use a digital signature on this form. Please print out the form, sign it by hand, and return it to our office attached to an email as an image, by fax, or by mail. All forms must be legible in order to be accepted. By signing this form, you certify the above is true and correct.

Student 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

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