



2026-2027 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.)

Please see page 2 for detailed instructions on how to report your assets.

Asset Type	Value	
Cash, Savings, and Checking Accounts:	\$	
Trust Fund(s):	\$	
Total of Other Investments:	\$	
	Current Value	Current Debt
Other Real Estate Value:	\$	\$
Business Value:	\$	\$
Farm Value:	\$	\$
Child Support Received:	\$	

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

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

How to Report Your Assets

Net worth means the current value, as of today, of investments, businesses, and/or investment farms, minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use 0 for investments or properties with a negative value.

Investments include real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc.

Investments also include qualified education benefits or education savings accounts such as Coverdell savings accounts, 529 college savings plans, and the refund value of 529 prepaid tuition plans. If the student is required to report parent information on the FAFSA form, parents should not report the value of education savings accounts for other children. Qualified education benefits or education savings accounts must be reported as an asset of the parent if the student is required to report parent information. If the student is not required to report parent information on the FAFSA form, the education benefit or savings account is reported as an asset of the student. UGMA and UTMA accounts are considered the assets of the student and must be reported as an asset of the student on the FAFSA form, regardless of whether the student is required to report parent information.

Investments do not include the home you live in, the value of life insurance, ABLE accounts, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.), or cash, savings, and checking accounts reported in the previous question.

Investments also do not include UGMA/UTMA accounts for which the student is the custodian but not the owner or the value of qualified education benefits or education savings accounts that are for the benefit of the parent's other children (not the student).

Investment value means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments.

Businesses and farms include businesses (including small or family-run businesses) owned by you that have more than 100 fulltime (or full-time equivalent) employees, along with the fair market value of real estate owned by the business. They also include income producing farms that you own, including the fair market value of land, buildings, livestock, unharvested crops, and machinery actively used in farming, agricultural, or commercial activities.

Businesses and farms do not include businesses with 100 or fewer full-time (or full-time equivalent) employees; the value of a family farm on which the family resides; the value of crops that are grown solely for consumption by the student and their family; a commercial fishing business and related expenses, including fishing vessels and permits owned and controlled by the family; or the home in which you live.