Brandeis University 2016-2017
Asset Clarification Form

Student's Name: ________________________________ Student ID: ____________________________

Instructions: In reviewing your application(s) for financial aid we have identified some information
that needs clarification. Please complete ONLY the section(s) below as indicated or for which a missing
document request is outstanding. Use information accurate as of _____________, the date you filed the
Free Application for Federal Student Aid (FAFSA).

CASH, SAVINGS, AND CHECKING

☐ Parent(s)  ☐ Student/Spouse

☐ Value of cash, savings, checking account(s)  $ __________  $ __________
(Please attach documentation of the value of these assets as of the day your FAFSA was filed ex. account statements)

INVESTMENTS

☐ Value of investments  $ __________  $ __________
(Investments do not include the home you live in, the value of life insurance, nor retirement plans.
(Please attach documentation of the value of these assets as of the day your FAFSA was filed ex. account statements)

☐ You/your parents have interest and/or dividend income reported on your most recent tax return or
the CSS PROFILE in the amount of $________. However, the corresponding value of assets was reported
as $__________, which is not consistent with the current rate of return. Please provide a written explanation
and attach it to this form.

☐ My high interest income is due to the redemption of a bond during the 2015 tax year.
(Please attach documentation of the interest income received from this bond. For example a 1099-INT)

REAL ESTATE

☐ Real Estate #1 Purchase Year & Price: ____________________  $ __________  $ __________
(Do not include primary residence unless it is a multi-family dwelling. If debt is higher than value, please attach an explanation.

Is this a multi-family dwelling?  ☐ Yes  ☐ No

If yes, percentage that is a rental property: _______%
(For example, in a duplex or a 2-story apartment building where you/your parent(s)/spouse reside in a portion of the dwelling
and the two units are of approximately the same size, you would indicate that 50% equals the percent that is rental property.)

☐ Real Estate #2 Purchase Year & Price: ____________________  $ __________  $ __________

☐ Real Estate #3 Purchase Year & Price: ____________________  $ __________  $ __________

If you have additional properties, attach a separate sheet listing purchase price, purchase year, real estate
value and debt. I certify that the information included on this form is true and I am willing to provide
additional documentation if requested. You (and one of the parents listed above, if dependent) must
sign below.

______________________________  ____________________________
Student’s Signature  Date

______________________________  ____________________________
Parent’s Signature  Date