

Brandeis University 2026-2027

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 2024 tax year.
(Please attach documentation of the interest income received from this bond. For example a 1099-INT)

REAL ESTATE

Total Value

Total Debt

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