



# Asset Verification

## 2024-2025

**Office of Financial Aid**  
 1050 North Mills Avenue  
 Claremont, CA 91711-6101  
 909.621.8208  
 Fax: 909.607.1205  
 Financial\_aid@pitzer.edu

**Student Name (please print)**

**Student ID (if known)**

Additional information is required regarding the assets you reported on the FAFSA and/or CSS Profile. Please note:

- **Do not leave any questions blank.** If a question does not apply to you, please write \$0 or N/A.
- For all assets, report the amounts **as of the date the student completed the FAFSA** or today's date (whichever came first).
- Do not include personal loans, consumer loans, financial aid or the value of life insurance policies.

### 1. Parent Information

Whose information is reported on this form? (Check all that apply)

- Both Parents     
  Custodial Parent     
  Noncustodial Parent     
  Stepparent

Parent 1 Name

Parent 2 Name (if applicable)

### 2. Cash, Checking and Savings

List banks or other institutions where you have checking or savings accounts and list the balance in those accounts.

Parent			Student		
Cash, Checking, & Savings	Total Amount	Bank Name	Cash, Checking, & Savings	Total Amount	Bank name
Bank 1			Bank 1		
Bank 2			Bank 2		
Bank 3			Bank 3		
Bank 4			Bank 4		

### 3. Investments

List all investments noted below. Do not duplicate values.

Parent	Total Amount	Student	Total Amount
Stocks		Stocks	
Bonds		Bonds	
Certificates of Deposit		Certificates of Deposit	
Trust Funds		Trust Funds	
Mutual Funds		Mutual Funds	
Other Investments		Other Investments	
Retirement accounts such as 401(k), 403(b) or IRA	Parent 1:		
	Parent 2:		
Child Name	529s Total Amount		UTMAs & UGMAs Total Amount
Applicant:			
Child 2:			
Child 3:			
Child 4:			



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Student ID (if known) \_\_\_\_\_

**THE FOLLOWING ASSETS ARE ASSUMED TO BE PARENT ASSETS**

**4. Home**

Do you own the home where you reside?  Yes  No

**Address of Home**

(List physical address. Do NOT list P.O. Boxes)

\$ \_\_\_\_\_ Current Market Value

\$ \_\_\_\_\_ Current Debt (1<sup>st</sup> and 2<sup>nd</sup> Mortgages)

\$ \_\_\_\_\_ Purchase Price

\_\_\_\_\_ Purchase Year

\_\_\_\_\_ Percent Ownership

Is this a multi-family home?  Yes  No

If yes, list number of dwellings: \_\_\_\_\_

Do you rent this property to others?  Yes  No

If yes, list date you began renting (month/year): \_\_\_\_\_

If yes, list what percent of your home you rent: \_\_\_\_\_

If you rent to family, list name(s)/relation: \_\_\_\_\_

\_\_\_\_\_

**5. Other Real Estate**

Do you own real estate other than the home where you reside?  Yes  No

**Address of Property 1**

(List physical address. Do NOT list P.O. Boxes)

\$ \_\_\_\_\_ Market Value

\$ \_\_\_\_\_ Debt

\$ \_\_\_\_\_ Purchase Price

\$ \_\_\_\_\_ Purchase Year

\_\_\_\_\_ Percent Ownership

**Address of Property 2**

(List physical address. Do NOT list P.O. Boxes)

\$ \_\_\_\_\_ Market Value

\$ \_\_\_\_\_ Debt

\$ \_\_\_\_\_ Purchase Price

\$ \_\_\_\_\_ Purchase Year

\_\_\_\_\_ Percent Ownership

\*If you own more than two properties, itemize each additional property on a separate sheet of paper and attach it to this form.



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### 6. Business/Farm

Do you own a business and/or farm? (Check all that apply)

Business

Farm

Neither

If you own a farm, do you live on the farm for more than 50% of the year?

Yes

No

#### Address of Business/Farm 1

(List physical address. Do NOT list P.O. Boxes.)

\$ \_\_\_\_\_ Market Value

\$ \_\_\_\_\_ Debt

\_\_\_\_\_ Year Purchased/Opened/Inherited

\_\_\_\_\_ Purchase Year

\_\_\_\_\_ Percent Ownership

\_\_\_\_\_ Business/ Farm Product

#### Address of Business/Farm 2

(List physical address. Do NOT list P.O. Boxes.)

\$ \_\_\_\_\_ Market Value

\$ \_\_\_\_\_ Debt

\_\_\_\_\_ Year Purchased/Opened/Inherited

\_\_\_\_\_ Purchase Year

\_\_\_\_\_ Percent Ownership

\_\_\_\_\_ Business/ Farm Product

#### Address of Business/Farm 3

(List physical address. Do NOT list P.O. Boxes.)

\$ \_\_\_\_\_ Market Value

\$ \_\_\_\_\_ Debt

\_\_\_\_\_ Year Purchased/Opened/Inherited

\_\_\_\_\_ Purchase Year

\_\_\_\_\_ Percent Ownership

\_\_\_\_\_ Business/ Farm Product

\*If you own more than three businesses/farms, itemize each additional business/farm on a separate sheet of paper and attach it.

### 7. Certification

I certify that the information reported on this form and all supporting documentation is true and accurate to the best of my knowledge. I understand that false statements or misrepresentations will be cause for denial, reduction, withdrawal and/or repayment of financial aid.

Student Signature

Print Name

Date

Parent Signature

Print Name

Date