



# Asset Verification – Student

## 2023-2024

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 your 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. Cash, Checking and Savings

Total value of cash, savings and checking: \$ \_\_\_\_\_

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

_____	\$ _____
Institution 1	Balance 1

_____	\$ _____
Institution 2	Balance 2

_____	\$ _____
Institution 3	Balance 3

_____	\$ _____
Institution 4	Balance 4

### 2. Investments

Do you own investments, such as stocks, bonds, certificates of deposit, trust funds, mutual funds, etc.?  Yes  No

If yes, list the value of all investments for yourself.

\$ \_\_\_\_\_

Do you have a college savings plan such as a 529 plan, UTMA, UGMA?  Yes  No

If yes, list the value of all 529 plans and the value of all UTMAs & UGMAs, as well as the account owner.

Child's Name	Value of 529 Plan Owned by Parent(s)	Value of UTMAs & UGMAs
Example: Cecil Sagehen	\$20,000	\$10,000

### 3. Independent Students Only

Do you own the home where you reside?  Yes  No

If yes, list the market value and debt

Value: \$ \_\_\_\_\_ Debt: \$ \_\_\_\_\_

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

If yes, list the market value and debt of all properties

Value: \$ \_\_\_\_\_ Debt: \$ \_\_\_\_\_

Do you have a retirement account such as a 401(k), 403 (b), or IRA?  Yes  No

If yes, list the value of all retirement accounts

\$ \_\_\_\_\_

Do you or your spouse (if applicable) own any 529 plans with your child(ren) as the beneficiary?  Yes  No

If yes, list the value of all 529 plans owned by you or your spouse (if applicable) for all dependent children

\$ \_\_\_\_\_

### 4. 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.

Parent Signature \_\_\_\_\_

Print Name \_\_\_\_\_

Date \_\_\_\_\_