

**Return to:**  
Office of Financial Aid  
301 Platt Boulevard  
Claremont, CA 91711  
Office: (909) 621-8055  
Fax: (909) 607-7046  
financial\_aid@hmc.edu

**Name of Student Financial Aid Applicant (please print):**

\_\_\_\_\_

**Last**

**First**

**Middle**

**Social Security Number:** \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

**2008-2009 Parent Asset Verification Form**

In reviewing your application for financial aid at Harvey Mudd College, we found that we need to obtain additional information regarding your parents' reported assets. Please answer all questions and **report amounts as of the date you filed your 2008-2009 Free Application for Federal Student Aid (FAFSA)**. See page 2 for additional instructions.

**A. CASH, SAVINGS AND CHECKING ACCOUNTS**

1. List banks or other institutions where your parent(s) have checking or savings accounts and list the balances in those accounts.

<u>Parents' Accounts</u>	<u>Balance</u>
Bank: _____	\$ _____
Bank: _____	\$ _____
Bank: _____	\$ _____
2. <b>Cash</b>	\$ _____

**B. HOME**

1. Do your parents own their home (primary residence)?  YES  NO  
IF YES,
2. What is the current market value of the home? \$ \_\_\_\_\_
3. How much is owed on the home? \$ \_\_\_\_\_
4. Year purchased \_\_\_\_\_
5. Purchase price \$ \_\_\_\_\_

**C. OTHER REAL ESTATE**

1. Do your parents own real estate other than their home?  YES  NO  
IF YES,
2. What is the current market value of this real estate? \$ \_\_\_\_\_
3. How much is owed on the real estate? \$ \_\_\_\_\_
4. Year purchased \_\_\_\_\_
5. Purchase price \$ \_\_\_\_\_

**D. BUSINESS AND/OR INVESTMENT FARM**

1. Do your parents own a business and/or an investment farm?  YES  NO  
IF YES,
2. How many employees does the business/farm have? \_\_\_\_\_
3. What is the current market value of this business/farm? \$ \_\_\_\_\_
4. How much is owed on this business/farm? \$ \_\_\_\_\_
5. If the business/farm has been sold, indicate the date of sale: \_\_\_\_\_

**E. INVESTMENTS**

1. Do your parents own other investments such as stock in a corporation, bonds, certificates of deposit, trust funds, mutual funds, etc.?  YES  NO  
IF YES,
2. What is the value of these investments? \$ \_\_\_\_\_
3. What is the debt against this value, if any? \$ \_\_\_\_\_
4. Describe: \_\_\_\_\_
5. Do your parents own a 529 plan?  YES  NO  
IF YES,
6. What is the value of the 529 plan? \$ \_\_\_\_\_

F. **OTHER ASSETS (please list source and value):** \_\_\_\_\_

\_\_\_\_\_

I (We) declare information reported on this form is true, correct, and complete to the best of my (our) knowledge. We give permission to the Office of Financial Aid to verify any of the above information. At least one parent must sign this form.

\_\_\_\_\_  
Mother's/Stepmother's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Father's/Stepfather's Signature

\_\_\_\_\_  
Date

**ASSET VERIFICATION INFORMATION**

Do not leave any of these questions blank. If a question does not apply to your parents, write in "0." **For all assets, indicate the amount(s) as of the date you completed your 2008-2009 Free Application for Federal Student Aid (FAFSA).**

If you are giving information only for one parent and that parent has jointly owned assets, give only that parent's portion of the assets and debts. If your parents have assets owned jointly with someone else --such as a business or farm-- give only your parents' portion of the assets and debts.

Do not include:

- personal or consumer loans
- the value of retirement plans (pension funds, annuities, non-education IRAs, Keogh Plans, etc.) unless the account is a Coverdell Education Savings Account
- student financial aid
- value of life insurance

A. **Cash, savings and checking accounts.**

B. **Home.** If your parents own a home, write in the current market value of the home.

**Home debt.** Write in how much your parents owe on their home, including all mortgages.

C. **Other real estate.** If your parents own other real estate (including rental property, land, or second homes), write in how much they are worth.

**Other real estate debt.** Write in how much your parents owe on other real estate.

D. **Business/Investment Farm value.** If your parents own a business/farm, write in how much the business/farm is worth. Include the market value of land, buildings, machinery, equipment, inventories, etc.

**Business/Investment Farm debt.** Write in what your parents owe on the business/farm.

Include only the present mortgage and related debts for which the business/farm was used as collateral.

E. **Investment Value.** Investments include trust funds, money market funds, mutual funds, certificates of deposit, stocks, bonds, other securities, stocks options, Coverdell savings accounts, college savings plans, pre-paid state tuition plans, installment and land sale contracts (including mortgages held), commodities, precious and strategic metals, etc.

**Investment Debt.** Write in what your parents owe on these investments, if applicable.