



2026-2027 Asset Confirmation/Valuation Worksheet

Student Name: _____ VU ID# _____

Amounts reported on the 2026-2027 FAFSA are a snapshot of the student/spouse or parent assets as of the date the FAFSA was originally submitted for processing. Federal regulations do not allow these amounts to be updated after the initial FAFSA is submitted*. We are requesting this form because either 1) the asset amounts have been changed, or, 2) the asset section(s) were blank, or, 3) the asset amounts provided on the FAFSA are inconsistent with the interest/dividend income on the 2024 federal tax return.

Complete the information below for: **Parent** **Student**

- If married at the time the FAFSA was completed provide information for student and spouse or both parents/stepparent
- Additional documentation to support the information provided on this form may be requested after our review
- Do not leave any required items blank. Write "0" if the asset type does not apply to you/your parent(s)
- **Net Worth** is determined by subtracting any current debt from the current market value of the asset(s)
- If you, your spouse, or your parent are not the sole owner of an asset, you only report the net worth amount for the share owned by you, your spouse, or your parent

STUDENT (AND SPOUSE) ASSETS	ASSET TYPE	PARENT(S) ASSETS
\$	As of the date you originally submitted the 2026-27 FAFSA, what was the total current value of cash, savings and checking accounts?	\$
\$	As of the date you originally submitted the 2026-27 FAFSA, what was the net worth of your investments, including real estate? Net worth means current value minus debt. If net worth is negative, enter "0". Investments include: <ul style="list-style-type: none">• Investment real estate and rental property• Trust funds, UGMA/UTMA accounts, money markets, mutual funds• CDs, stocks, stock options, bonds, other securities• Installment and land sale contracts (including mortgages held), commodities, etc.• Qualified education benefits or savings accounts (e.g. 529 plans, Coverdell accounts) Do not include the home you live in, the value of life insurance, retirement plans (pension funds, annuities, or non-education IRAs, Keogh plans, etc.).	\$
\$	As of the date you originally submitted the 2026-27 FAFSA, what was the net worth of your business and/or investment farm(s)? Include: <ul style="list-style-type: none">• Market value of land, buildings, machinery, equipment, inventory, etc.• Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral Do not include a family farm that you/your spouse or your parents live on and operate, or, a family business that you/your spouse or your parents own and control <u>more than 50%</u> , and, has 100 or fewer full-time or full-time equivalent employees.	\$

_____ * Check here if an asset amount was initially reported incorrectly on the 2026-27 FAFSA and is why the assets were changed.

Provide a detailed, written explanation of how the initial asset amount was incorrect. Use the back of this form or attach a separate sheet for your narrative.

I/we certify that all information reported on this worksheet is true and complete. The student, and a parent if student is dependent for the FAFSA, must sign.

Student Signature: _____ Date: _____

Parent Signature: _____ Date: _____

Return this form to: Financial Aid Office - Viterbo University 900 Viterbo Drive La Crosse, WI 54601
Email: FinancialAid@viterbo.edu (to submit form or ask questions)
Phone: (608) 796-3900