

401 S. State Street • Chicago, IL 60605 • TEL: 312-935-6260 • FAX: 312-935-6201 • EMAIL: financialaid@robertmorris.edu

The information requested on this form is needed to process your application for financial aid for 2019-2020. Complete this form and return it to the address above within 30 days. All submitted information must include the student's RMU ID number.

Student's Name (Last, First, M.I.) _____

RMU ID Number (required) _____ Email Address _____

Section A - Asset Information

Based on our review of your financial aid application and federal income tax information, we are requesting additional information to clarify the total value of your and/or your parents' assets. We note that you and/or your parents' 2017 federal income tax transcript(s) list asset-generated income (interest, dividends, capital gains, etc.), or the total value of assets listed on your aid application is inconsistent with the information you reported on the taxes. Because federal regulations require that discrepant family data be reconciled, we ask that you report below your and/or parents' assets as of the date your Free Application for Federal Student Aid (FAFSA) was filed.

ASSET TYPE	VALUE AS OF DATE FAFSA WAS FILED	
	PARENT	STUDENT
Trust Funds	\$	\$
Prepaid tuition and/or tuition savings plans such as MET, MESP, other 529 plans, etc (for all children)	\$	\$
INVESTMENTS	\$	\$
Money Market	\$	\$
Mutual Funds	\$	\$
Certificates of Deposit (CDs)	\$	\$
Stocks/Bonds	\$	\$
Other	\$	\$

REPORTING INFORMATION:

- **Excluded Assets:** Do not report family farms, or value of retirement plans (IRA, Keogh, 401(k), etc.
- **Custodial Accounts for Minor Children (i.e. Uniform Gifts to Minors):** Report as student (not parent) asset.
- **Joint Accounts Other Than Those Shared with Your Spouse:** Report only your share of joint account.
- **Savings Bonds:** For bonds that have not matured, check with your bank for current values.
- **Trust Funds:** Current value, plus interest, unless trust is restricted by court order (for example, to cover future medical expenses in an insurance settlement).

REAL ESTATE	FAIR MARKET VALUE, IF SOLD TODAY		DEBT	
	PARENT	STUDENT	PARENT	STUDENT
Rental Property (Not primary residence)	\$	\$	\$	\$
Second Home	\$	\$	\$	\$
Other	\$	\$	\$	\$
BUSINESS/FARM if more than one, list on reverse)				
Name:	\$	\$	\$	\$
Type: <input type="checkbox"/> Corporation <input type="checkbox"/> S-Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Non-family farm	Number of Employees: _____			
If the number of employees is LESS THAN 100 people, SKIP to Section B				
Is this a family owned business? <input type="checkbox"/> Yes <input type="checkbox"/> No	Total percentage owned and controlled by family:			
Amount borrowed from business in 2017: \$ _____				

- **Installment or Land Contracts:** Report the current principal and interest balance remaining on contract.
- **Business/Farm:** Provide tax schedules, Schedule K-1, and/or corporate tax return

Section B - Certification and Authorization

Do NOT submit without ALL required signatures.

I (we) certify that the information provided on this form is correct and complete. I (we) also agree to contact the RMU Office of Financial Aid if the information provided require changes.

STUDENT'S SIGNATURE _____

DATE _____

PARENT'S SIGNATURE _____

DATE _____

SPOUSE'S SIGNATURE (IF APPLICABLE) _____

DATE _____