



Office of Financial Aid

315 Turnpike Street
North Andover, MA 01845
Phone: 978-837-5186

Fax: 978-837-5067
e-mail: financialaid@merrimack.edu
www.merrimack.edu/aid

2017-2018 Asset Clarification Form - Parent

Student Name _____ Merrimack ID Number _____

Instructions: In reviewing your application for financial aid we have found that either your parent(s) did not supply their asset information on the Free Application for Federal Student Aid (FAFSA) or additional clarification is needed. Please complete this form in its entirety using information accurate **as of the initial filing date of your FAFSA**. If a section does not apply, enter zeros or "N/A" where appropriate.

Please provide all data for the parent(s) whose information was provided on the FAFSA.

PERSONAL & INVESTMENT ACCOUNTS	
Value of Cash, Savings, Checking Accounts: \$ _____	<i>Investments include</i> stocks, stock options, bonds, mutual funds, securities, certificates of deposit (CDs), money market funds, trust funds, UGMA/UTMA accounts, 529 college savings plans, and Coverdell savings accounts.
Value of Investments: \$ _____	<i>Investments do not include</i> primary residence, the value of life insurance, retirement plans (401K plans, pension funds, annuities, non-education IRA's, Keogh plans, etc.) or UGMA and UTMA accounts.

REAL ESTATE <i>(Do not include primary residence unless it is a multi-family dwelling. If debt is higher than value, include explanation.)</i>		
Property Address: Street _____ City _____ State _____ Zip _____	Multi-family dwelling? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, percentage that is rental property: _____ %	Total Value: \$ _____ <i>(minus)</i> Total Debt: \$ _____ <i>(equals)</i> Net Worth: \$ _____

BUSINESS/FARM <i>(Business/farm value includes the market value of land, buildings, machinery, equipment, inventory, etc. Business/farm debt refers only to those debts for which the business/farm was used as collateral. If debt is higher than value, include explanation.)</i>		
Name of Business/Farm: _____ Your % of Ownership: _____ % Number of Employees: _____ List the name(s) of owners/partners, relationship to student/spouse and % of ownership: _____ _____	Type: <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> S Corporation <input type="checkbox"/> C Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Farm	Total Value: \$ _____ <i>(minus)</i> Total Debt: \$ _____ <i>(equals)</i> Net Worth: \$ _____

Please check one:

- I **do not have** additional real estate and/or business/farm properties. **OR**
- I **have** additional real estate and/or business/farm properties and have attached a separate sheet with the relevant information pertaining to each property.

I certify that the information included on this form is true and I am willing to provide additional documentation if requested.

Parent's Name (print): _____ Date: _____

Parent's Signature : _____