Parent Asset Clarification Worksheet

Student Name: ___________________________ LIN: ___________________________

Upon review of your application for need-based financial aid, we have discovered a discrepancy regarding the amount of assets owned by your parent(s). Please provide the amounts for the assets items listed below which are owned by your parent(s) along with any supporting documentation you are able to provide.

Cash, Checking & Savings Accounts: $ ___________________________
Total Investment Value*: $ ___________________________
  Primary Home Value: $ ___________________________
  Primary Home Debt**: $ ___________________________
Other Real Estate Value: $ ___________________________
Other Real Estate Debt: $ ___________________________

* Do not include formal retirement plan savings. Included in the amount is: trust funds, stocks, stock options, bonds, savings bonds and mutual funds, money market funds, certificate of deposit, Coverdell savings accounts, assets in sibling(s) name, Section 529 college savings (529 plans owned by a dependent student or one of their parents are considered parental assets) or prepaid tuition plans.

** Include any 2nd mortgage and/or HELOC balance.

Certification and Signature:

I certify that the information provided above is true and complete to the best of my knowledge.

Parent Name: ___________________________
Parent Signature: ___________________________ Date: ___________________________

Please submit to the Lehigh University Office of Financial Aid
Via LU FileSender at www.lehigh.edu/financialaid or by mail
You may also contact our office at (610)758-3181 or financialaid@lehigh.edu