



WHITMAN COLLEGE™

2024-25 Asset Verification Worksheet

Student Name: _____

Student Date of Birth: _____

Email Address: _____

Phone: _____

Home Address: _____

City, State and Zip: _____

Answers must reflect values as of the day you completed the CSS Profile		Parent Amount	Student Amount
Cash, Savings, Checking	Enter total balance of cash, savings, and checking accounts		
Business Value	Include the market value of land, buildings, machinery, equipment, inventories, etc. less any debts for which the business was used as collateral.		
Investment Farm Value	Include the market value of land, buildings, machinery, equipment, livestock, inventories, etc. less any debts for which the investment farm was used as collateral.		
Real Estate Investments	Enter the net value (total market value less debt) of investment real estate. Investment real estate includes rental properties, land, secondary or summer homes. Do NOT include the value of your primary residence or properties whose value has already been included in any business/farm value you reported.		

PLEASE COMPLETE THE REVERSE SIDE OF THIS FORM

Answers must reflect values as of the day you completed the CSS Profile		Parent Amount	Student Amount
Qualified Educational Benefits or Education Savings Accounts designated for the student	Report the value of qualified educational benefits or education savings accounts designated for the student such as Coverdell savings accounts, 529 college savings plans, and the refund value of 529 prepaid tuition plans. If the student is Dependent, the accounts are reported as parental investments		
Qualified Educational Benefits or Education Savings Accounts designated for other members of the household	Report the value of qualified educational benefits or education savings accounts designated for the any member of the household other than the student such as Coverdell savings accounts, 529 college savings plans, and the refund value of 529 prepaid tuition plans.		
Other Investments	Investments include stocks and stock options, bonds, savings bonds, mutual funds, money market funds, certificates of deposit, trust funds, commodities, installment and land sale contracts, etc. UGMA and UTMA accounts owned by the student are considered assets of the student. UGMA and UTMA accounts owned by the parent are considered assets of the parent. Investments do not include the value of life insurance policies, qualified retirement plans (e.g., 401k plans, pension funds, annuities, non-education IRAs, Keogh accounts), ABLA accounts, UGMA/UTMA accounts for which you are the custodian but not the owner, or amounts already reported above.		

By signing this worksheet, we certify that all the information reported on this worksheet is complete and correct.

Student Signature: _____ Date: _____

Parent Signature: _____ Date: _____

Use one of the following methods to return this form	To protect your data, we do not accept documents via email attachment
Online upload using College Board's Institutional Documentation Service (IDOC)	https://pages.collegeboard.org/idoc
Online upload using Whitman's ShareFile Secure File Transfer	https://sharefile.whitman.edu/filedrop/finaid