



Boston University Financial Assistance

**2023/2024
STUDENT ASSET DOCUMENTATION**

Complete this form **only** if you received a special request from BU Financial Assistance for additional information about your assets. It is intended to clarify potentially incomplete or conflicting asset information you provided previously. Once we receive your asset documentation, we will resume processing your application.

Complete and submit this form via **MyBU portal**, or if you are a returning student to:

Boston University Financial Assistance
881 Commonwealth Avenue, Fifth Floor
Boston, MA 02215 – Fax: 617-358-2792

STUDENT NAME _____ STUDENT BU I.D. # U _____

Email: _____ Phone: _____

STUDENT ASSET INFORMATION

| ACCOUNT | INTEREST/ DIVIDEND INCOME ¹ | CURRENT VALUE | PLEASE ATTACH <i>(Print student name and BU ID prominently on each document.)</i> |
|--|--|------------------|--|
| CASH, SAVINGS, CHECKING | \$ | \$ | BANK STATEMENTS |
| ALL INVESTMENTS: STOCKS, BONDS, CDs | \$ | \$ | BANK & BROKERAGE STATEMENTS |
| REDEEMED BONDS | \$ | N/A | LETTER OR DOCUMENTATION OF REDEMPTION AMOUNT |
| TRUSTS | \$ | \$ | TRUST AGREEMENTS |
| 1099-INT/DIV statements can be sent along with, <i>but not in lieu of</i> , the required documentation | | | |

STUDENT SIGNATURE _____ DATE _____

¹ Interest and/or dividend income earned during the 2021 tax year. You can also find this information on your 2021 federal tax return (IRS Form 1040) and on your 1099-INT/DIV statements.