Student Financial Services
2025-2026
ASSET INFORMATION FORM

______________________________ Student's Name

______________________________ Student ID #

Check the box to indicate the person filling out this form: ☐**Student/Spouse** ☐**Parent(s)**

Please respond below to report asset values as of the date you submitted your FAFSA or Cal Dream Act Application. **Do not leave any questions blank**. Mark a zero if you have nothing to report.

What was the balance of your cash, savings, and checking accounts? (DO not include student financial aid) $ __________

What was the value of your investments? $ __________

Investments include trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, 529 college savings plans, the refund value of 529 prepaid tuition plans, installment and land sale contracts (including mortgages held), commodities, etc.

Do not include the value of life insurance and retirement plans (401k Plans, pension funds, annuities, non-education IRA's, Keogh plans, etc.), or cash, savings, and checking accounts already reported above.

Note: For more information about reporting education savings plans, refer to the FAFSA instructions or call 1-800-433-3243.

What is the net worth of your real estate investments? (DO NOT include the home you live in.)

List the values of all other real estate you own or are purchasing, including rental property, mobile homes, condos, duplexes, land, vacation homes, etc.

❑ ***Check this box if you do not own real estate investments*** or

❑ ***Complete the questions below <u>ONLY</u> if you own real estate investments other than the home you live in***

Property Address:____

Current Market Value $______________ (Amount you could sell property for.) Mortgage Balance $______________
(Amount required to pay off the entire mortgage.)

What was the net worth of your business and/or investment farm? $ __________

Net worth is the value of the businesses or farms **minus** any debts owed against them.

Applicants should determine the total net value of all farm assets and subtract the net value of their principal residence to determine the final value of their farm assets.

The principal residence may include the family's home, as well as structures and land adjacent to the home that are not being used, stored, or sold for farming or other commercial activities. Property values are generally assessed at a rate that considers the use of the property and the value of the land. Applicants and their families may refer to their property tax assessments from municipal, county, or state governments to help determine and separate the value of their principal residence from other property. Debts owed against the principal residence—such as a mortgage—should also be subtracted from the assessed value of the residence to determine the net value.

Businesses and investment farms include businesses that you own (including a small or family-run business) or income-producing farms that you own (including the fair market value of land, buildings, livestock, unharvested crops, and machinery actively used in investment farms, agricultural, or commercial activities).

Businesses and investment farms do not include the value of crops that are grown solely for consumption by the student and their family or the home in which you live. If the home in which you live in is also located on a farm that you own, do not include the net value of that principal residence in the net value of all farm assets. The principal residence may include the home, structures, and land that are adjacent to the home that are not being used, stored, or sold for farming or other commercial activities.

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Please enter the total amount of child support received for the last complete calendar year, as of the date you submitted your FAFSA or Cal Dream Act Application.

❑ I/We DID NOT receive child support for the last complete calendar year.

Complete only one box if you did receive child support:

If the FAFSA was completed on **December 31, 2023**	
Report Annual Amount Child Support for the **2022** Year	$

If the FAFSA was completed **BETWEEN:** January 2025-December 2025	
Report Annual Amount Child Support for the **2024** Year	$

If the FAFSA was completed **AFTER:** January 2026	
Report Annual Amount Child Support for the **2025** Year	$

I certify that the information provided is true and complete. I understand that this information will be used to determine the student's eligibility for financial aid and that false or misleading statements may be cause for termination of aid and repayment of funds received.

Signature: ____ Date: ________________________