



California State University, Sacramento  
 Student Service Center  
 Financial Aid & Scholarships Office  
 Lassen Hall  
 6000 J Street, Sacramento, CA 95819-6044  
 Phone: (916) 278-1000

Print Name: \_\_\_\_\_

Sac State ID #:

## PARENT ASSET INFORMATION

The asset information reported on your student's 2023-2024 Financial Aid Application was either blank or requires clarification. **Answer ALL asset questions or write 0 (ZERO) if not applicable.**

### Total the Amounts for Each Legal Parent in the Household

**As of the date your student completed the financial aid application**, what was the total balance of your cash, savings and checking accounts? Do not include your student's financial aid.

\$ \_\_\_\_\_

**As of the date your student completed the financial aid application**, what was the net worth of your investments? (See instructions below)

\$ \_\_\_\_\_

**As of the date, your student completed the financial aid application**, what was the net worth of your businesses and/or investment farms? (See instructions below)

\$ \_\_\_\_\_

#### How to calculate the net worth of an investment

- Investment Value – Investment Debt = Net Worth
  - When calculating net worth, use 0 (zero) for assets with a negative value

#### Investments include

- Rental properties
  - Includes a unit within a family home that has its own entrance, kitchen, and bath and is rented to someone other than a family member
- Money market funds, mutual funds, certificates of deposit, stocks, stock options, commodities, bonds, other securities, and land sale contracts or mortgages
- Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans
  - Report all accounts owned by your student and all accounts owned by you the parents for any member of the household
- Trust funds even if the individual does not have access to the funds at this time and medical savings accounts

#### Investments DO NOT include

- The home you live in, the value of life insurance, 401[k] plans, pension funds, annuities, non-education IRAs and Keogh plans, cash, savings and checking accounts already reported. Do not include your student's financial aid. Also, do not include Medical Savings accounts if you are the custodian of them, but not the owner

#### Business investments DO NOT include

- A small business you (and spouse) or family owns and controls more than 50% of the business and if the business has 100 or fewer full-time or full-time equivalent employees

#### Farm investments DO NOT include

- A family farm that you (and your spouse) live on and operate

## Certification Statement

Each person signing below certifies that all the information reported is complete and correct. The student and one parent whose information was reported on the financial aid application must sign and date. (Typed signature is not acceptable)

\_\_\_\_\_  
 Student Signature

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Parent Signature

\_\_\_\_\_  
 Date

Once completed upload financial aid documents at  
<https://onbaseform.csus.edu/obforms/eforms/STDAF/DocumentSubmission/finaidupload.aspx>