

# Parent Asset Information

**2023-2024** (Fall 2023, Spring 2024, Summer 2024)

Name: \_\_\_\_\_  
Student's Name (Last, First, M.I.)

ID: \_\_\_\_\_  
Student Identification Number (SID)

This form is used to verify parent savings, investments and business value to determine eligibility to receive financial aid. Additional documentation may be requested.

**1. Please provide the following amounts as of the date the FAFSA was submitted:**

	Amount
<b>Parents' total balance of cash, savings and checking accounts</b>	\$ _____
<b>Parents' net worth of investments</b> <i>Include value of 529 plans held in <b>parents' and/or student's name</b>. Include other real estate, but do not include value of the home you live in.</i>	\$ _____
<b>Parents' net worth of current businesses and/or investment farms</b> <i>Don't include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.</i>	\$ _____

**Net worth** means current value minus debt. If net worth is negative, enter 0.

**Investments include** real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc.

**Investments also include** qualified educational benefits or education savings accounts (e.g., Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans). Include all accounts owned by the student and all accounts owned by the parents.

**Investments do not include:**

- The home you live in, the value of life insurance, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings or checking accounts.
- UGMA and UTMA accounts for which you are the custodian, but not the owner.

Investment value means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments.

**Business and/or investment farm value include** the market value of land, buildings, machinery, equipment, inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral.

**Business value does not include** the value of a small business if your family owns and controls more than 50 percent of the business and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, your family includes (1) persons directly related to you, such as a parent, sister or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law.

**2. By signing this form, I certify that all the information provided is complete and accurate.**

\_\_\_\_\_  
Parent signature

\_\_\_\_\_  
Date

Electronic and typed signatures are not acceptable.

Please submit your form by mail or online at [www.colorado.edu/financialaid/forms/secure-document-upload](http://www.colorado.edu/financialaid/forms/secure-document-upload)  
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