



2024-2025

Documentation of Contributor (Parent) Net Worth of Real Estate/Investments

Please Use Black or Blue Ink

Student Legal Name:	OSU Student ID ("A" plus 8 digits)							
	A							

We are reviewing information on the 2024-2025 Free Application for Federal Student Aid (FAFSA) and we need some additional documentation before we can determine eligibility for financial aid. We need to determine the correct total net worth of real estate/investments for the contributors listed on the FAFSA, as of the date the 2024-2025 FAFSA was originally signed.

A contributor should complete and sign this form and submit it to the address below. Additional documentation may be requested after this form is reviewed. No determination of aid eligibility can be made until all requested documents are received and reviewed.

Contributors' (Parents') Net Worth of Real Estate/Investments (See definitions and instructions on the next page)	Amount
What was the total of the contributors' net worth of real estate/investments as of the date the 2024-2025 FAFSA was originally signed?	\$ _____

Please explain why this information was changed from the original amount reported on the FAFSA:

Certification/Signature:

By signing this form, I certify that all the information reported to qualify for federal student aid is complete and correct. If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Contributor's Signature (Stylus or ink pen only) _____ Date _____

Printed Legal Name of Contributor Who Signed Above Street Address City State Zip

Return to: Office of Scholarships and Financial Aid 119 Student Union, Stillwater, OK 74078-5061 Fax: (405) 744-6438 (if you fax, please do not mail the form)

Questions? Email: finaid@okstate.edu Phone: (405) 744-6604 Web: financialaid.okstate.edu

Definitions:

- **Net Worth:** means the current value, as of today, of investments, minus debts related to those same investments. When calculating net worth, use 0 for investments or properties with a negative value.
- **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.

Net Worth of Real Estate/Investments.

Include the following:

- 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 & 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.

Education Savings Plans:

- Investments also include qualified educational benefits or education savings accounts such as Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans.
- If the student is required to report parent information on the FAFSA form, parents should not report the value of education savings accounts for other children. Qualified education benefits or education savings accounts must be reported as an asset of the parent if the student is required to report parent information. If the student is not required to report parent information on the FAFSA form, the education benefit or savings account is reported as an asset of the student.
- UGMA and UTMA accounts are considered the assets of the student and must be reported as an asset of the student on the FAFSA form, regardless of whether the student is required to report parent information.

Investments DON'T include:

- The home in which you live,
- The value of life insurance,
- ABLE accounts,
- The value of retirement plans (401k plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.)
- Cash, savings, and checking accounts,
- UGMA/UTMA accounts for which the student is the custodian but not the owner or the value of qualified education benefits or education savings accounts that are for the benefit of the parent's other children (not the student).