



PNWR24

2023-2024
Documentation of 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 2023-2024 Free Application for Federal Student Aid (FAFSA) and we need some additional documentation before we can determine eligibility for financial aid.

The parent(s) 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.

Table with 2 columns: Parents' Net Worth of Real Estate/Investments (See definitions and instructions on the next page), Amount. Row 1: What was the total of the parents' net worth of real estate/investments as of the date the 2023-2024 FAFSA was originally signed? \$

Please explain why this information was changed on the FAFSA:

Blank lines for explanation of FAFSA changes.

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.

Parent's Signature (Stylus or ink pen only) Date

Printed Legal Name of Parent 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:

- **Investment Value:** Current balance or market value of investments as of the date indicated.
- **Investment Debt:** Includes only those debts that are related to the investments.
- **Net Worth:** Current value minus debt. If net worth is negative, enter 0.

Net Worth of Real Estate/Investments. Include the following:

- Real estate (do not include the home in which you live),
- Trust funds,
- UGMA & UTMA accounts,
- Money market funds,
- Mutual funds,
- Certificates of deposit,
- Stocks,
- Stock options,
- Bonds,
- Other securities,
- Coverdell savings accounts,*
- 529 college savings plans,*
- Refund value of 529 state prepaid tuition plans,*
- 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.
- For a student who must report parental information on the Free Application for Federal Student Aid (FAFSA), the accounts are reported as parental investments. This includes accounts owned by the student and all accounts owned by the parents for any member of the household.
- For a student who is not required to report parental information on the FAFSA, the accounts owned by the student (and the student's spouse, if married) are reported as student investments.
- For more information about reporting education savings plans, call the Federal Student Aid Information Center at 1-800-433-3243.

Investments DON'T include:

- The home in which you live,
- Cash, savings, or checking accounts already reported on the form,
- The value of life insurance and retirement plans (401k plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.).