



Office of Financial Aid
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2026-2027 Parent Asset Worksheet

Student Name: _____

SMC ID# _____

Please provide the information requested below to verify your assets. **Report the value of assets as of the date the student's initial 2026-2027 FAFSA was submitted.** If your answer to question #32 on the FAFSA (Parent Current Marital Status) was "Married," "Remarried," or "Unmarried and both legal parents living together," enter the combined amounts held by the parent and their spouse. Do not leave any items blank. If any item does not apply, enter N/A.

1. CASH, SAVINGS, & CHECKING ACCOUNTS (If this section does not apply, enter "0" or "N/A" in the table below.)

Include cash, savings and checking account balances **as of the date you completed the initial FAFSA.**

Description of account	Balance As of Initial FAFSA Filing Date

2. INVESTMENTS (If this section does not apply, enter "0" or "N/A" in the table below.)

Include: Stocks, bonds, mutual funds, money market funds, certificates of deposit, trust funds, tax exempt funds, education savings accounts such as 529 Plans for the above named student, etc.

Do not include: Life insurance, formal retirement accounts (401(k) plans, annuities, pension funds, non-educational IRA's, KEOGH plans), UGMA/UTMA accounts for which the student is the custodian but not the owner, education savings accounts for the benefit of the parents' other children not named above.

Description of investment	Value As of Initial FAFSA Filing Date

3. REAL ESTATE OTHER THAN PRIMARY RESIDENCE

☐ Not applicable – no real estate other than primary residence.

If applicable, include rental properties, land, installment sales, vacation properties, seasonal camps, etc. below:

Property Description: _____

Street Address: _____

Current market/resale value \$ _____

Current amount of unpaid mortgage principal against this property \$ _____

****CONTINUE TO PAGE 2****

Property Description: _____

Street Address: _____

Current market/resale value \$ _____

Current amount of unpaid mortgage principal against this property \$ _____

4. BUSINESS AND/OR INVESTMENT FARM VALUE

☐ Not applicable: No business and no investment farm owned.

If applicable complete the items below:

Include: The fair market value of land, buildings, machinery, equipment, inventory, etc. actively used in commercial or agricultural activities or 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 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.

Description _____

Current market/resale value of business/investment farm \$ _____

Amount of unpaid debt for business/investment farm \$ _____

5. **CERTIFICATION:** I certify that all the information reported on this form is true, complete and correct. I understand that any false statements could be cause for denial, reduction, withdrawal or repayment of financial aid.

Please print, sign and date before submitting. We CANNOT accept digital signatures.

Parent's Name (print) _____

Parent's Signature _____

Date _____