Financial Aid Office
1801East Cotati Avenue
Rohnert Park, CA 94928

www.sonoma.edu/finaid
Telephone: (707) 664-2389
Fax: (707) 664-4242

SONOMA
STATE UNIVERSITY

2019-20 Blank Assets (Parent)

Student Name [   ]   SSU I.D. [   ]

Instructions to Parent: After review of your student's financial aid application and/or your 2017 income verification documents, additional information is required. When completing the application, these asset questions were not asked of you. However, collection of this information is now required.

The date you originally completed the application appears on the Asset Follow Up Notification email recently sent to your student. Please certify the total amount of your assets, as of that date, using the boxes below.

Section 1: Cash/Savings/Checking

Cash Amount [   ] + Savings Amount [   ] + Checking Amount [   ] = Total [   ]

Section 2: Investment Net Worth

Investment Total Value [   ] - Investment Total Debt (related to investment) [   ] = Investment Net Worth [   ]

Instructions for Investment Net Worth

"**Net worth**" means current value of your investments minus any debt against those investments.

Investments **include** real estate (excluding the home you live in), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, 529 college savings plans, the refund value of 529 state prepaid tuition plans, installment and land sale contracts (including mortgages held), commodities, etc.

Investment value includes the market value of these investments as of the date the financial aid application was completed. (The date you originally completed the application appears on the Asset Follow Up Notification email recently sent to your student.)

Investment debt means only those debts that are related to the investments. Investments **do not** include the home you live in, the value of life insurance, retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings, and checking accounts already reported in Section 1 of this form.

Sign This Statement
I certify that all the information reported on this form is complete and correct.

_____   _____
Parent Name (please print)   Phone Number

_____   _____
Parent Signature   Date