

2020-2021 ASSET INFORMATION WORKSHEET

(Summer Term 2020 – Spring Term 2021)

Student Last Name	Student First Name
Student ID#	Date of Birth

Upon review of your verification documents, or due to a FAFSA rejection, we need to confirm the value of your assets. Please follow the guidance provided below to assist you in providing this information. Please complete ALL information below as it was on the date you first filed the 2020-2021 FAFSA.

- Refer to you and your parents’/spouse’s 2018 federal tax return. If a federal tax return form 1040 was filed, check for dollar amounts listed on lines 2a, 2b, 3b and Schedule 1 lines 12, 13, 17, or 18. If there is an amount on any of these lines, it is an indication of potential assets to be reported on the FAFSA. Please list the dollar amount of any assets associated with the above line numbers as of the date the FAFSA was completed.
- NOTE: The dollar amount listed on the 1040 is NOT the same as asset net worth you list below. Net worth means current value minus debt. If you have no amounts please write zero (0) in the boxes provided below, leaving no blanks.

A. Asset Values (do not leave any blanks)

	PARENT(S) OR SPOUSE	STUDENT
1. Total balance of cash, checking, and savings accounts:	\$	\$
2. Net worth of Investments (Examples: real estate, trust funds, money market funds, mutual funds, stocks, bonds, college savings plans, etc. Do not include your primary residence, retirement accounts, or life insurance):	\$	\$
3. Net worth of Investment Farm (Do not include if you or your parent(s) live on it):	\$	\$
4. Do you own a business? (Circle YES/NO). If “NO,” skip to section B:	YES / NO	YES / NO
5. If “Yes” in box (4), does your business employ more than 100 full-time employees? (Circle YES/NO). If “NO,” skip to section B:	YES / NO	YES / NO
6. Net worth of Business:	\$	\$

B. Certification Statement & Signatures

By signing below, I acknowledge that I have read and understand the information on this form, and certify that all information submitted is accurate and true to the best of my knowledge.

 Student’s Signature

 Date

 Parent’s Signature (Required if Dependent Student)

 Date

Check your myClackamas account for all financial aid correspondence and your Award Letter.

Secure submission of documents can be completed in person, by mail, or fax to:

Office of Financial Aid and Scholarships · Roger Rook Hall · 19600 Molalla Avenue, Oregon City, OR 97045

Phone: 503-594-6082 · Fax: 503-722-5864 · e-mail: finaid@clackamas.edu · www.clackamas.edu

Need assistance? Financial Aid Resource Lab hours: Monday-Thursday, 10am-1pm and 1:30-3