



ASSET VALUE WORKSHEET FOR PARENT(S)

STUDENT INFORMATION

AID YEAR: 22/23

LLU ID# or Social Security Number: _____

Student Name: Last _____ First _____ Middle _____

VALUE OF ASSETS

IMPORTANT – As the parent, your answers should reflect asset values as of the day the student completed the Free Application for Federal Student Aid (FAFSA). For information and guidelines regarding fields 1-3, please see information below the table. If a field does not apply, answer “0”.

Table with 2 columns: Description and Value. Row 1: 1. Cash, savings, and checking accounts: \$; Row 2: 2. Net worth of investments, including real estate (not your home) – Net worth means current value minus debt: \$; Row 3: 3. Net worth of your businesses and/or investment farms? Do not include the value of small business that you own and control more than 50 percent of, with 100 or fewer full-time or full-time equivalent employees. \$

Cash, savings, and checking accounts balances: Include balances of all accounts as of the date the FAFSA was signed. Do not include student financial aid.

Investments: Include real estate (do not include 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 means the current value of these investments as of today. 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 (401(K), pension funds, annuities, non-educational IRA’s, Keogh plans, etc.) or cash, saving, and checking accounts already reported.

Business and/or investment farm: Business or farm value includes the current market value of land, buildings, machinery, equipment, inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral.

Do not include the value of a family farm that you (or your spouse) live on and operate. Do not include the value of a small business that you own and control more than 50 percent of, with 100 or fewer full-time, or full-time equivalent employees.

REQUIRED SIGNATURES

I certify that all the information reported on this worksheet is true and accurate to the best of my knowledge. I realize that I may be asked to provide supporting documentation to verify the above information. I understand that this information will be used to determine the student’s eligibility for financial aid and that false or misleading information may be cause for termination of aid and repayment of funds received.

Student’s Signature: _____ Date: ____/____/____

Parent’s Signature: _____ Date: ____/____/____

RETURN FORM TO :

LLU Office of Financial Aid
11139 Anderson St.
Loma Linda, CA 92350
Fax # (909) 558 - 4283

If you have any questions please email Finaid@llu.edu or call (909) 558-4509