



# Asset Verification – Parent

## 2023-2024

Office of Financial Aid  
1050 North Mills Avenue  
Claremont, CA 91711-6101  
909.621.8208  
Fax: 909.607.1205  
Financial\_aid@pitzer.edu

Student Name (please print) \_\_\_\_\_

Student ID (if known) \_\_\_\_\_

Additional information is required regarding the assets you reported on the FAFSA and/or CSS Profile. Please note:

- **Do not leave any questions blank.** If a question does not apply to you, please write \$0 or N/A.
- For all assets, report the amounts **as of the date your student completed the FAFSA** or today's date (whichever came first).
- Do not include personal loans, consumer loans, financial aid or the value of life insurance policies.

### 1. Parent Information

Whose information is reported on this form? (Check all that apply)

- Both Parents       Custodial Parent       Noncustodial Parent       Stepparent

Parent 1 Name \_\_\_\_\_

Parent 2 Name (if applicable) \_\_\_\_\_

### 2. Cash, Checking and Savings

Total value of cash, savings and checking: \$ \_\_\_\_\_

List banks or other institutions where you have checking or savings accounts and list the balances in those accounts.

|               |           |
|---------------|-----------|
| _____         | \$ _____  |
| Institution 1 | Balance 1 |

|               |           |
|---------------|-----------|
| _____         | \$ _____  |
| Institution 2 | Balance 2 |

|               |           |
|---------------|-----------|
| _____         | \$ _____  |
| Institution 3 | Balance 3 |

|               |           |
|---------------|-----------|
| _____         | \$ _____  |
| Institution 4 | Balance 4 |

### 3. Home

Do you own the home where you reside?     Yes     No

#### Address of Home

(List physical address. Do NOT list P.O. Boxes.)

\$ \_\_\_\_\_ Current Market Value  
\$ \_\_\_\_\_ Current Debt (1<sup>st</sup> & 2<sup>nd</sup> mortgages)  
\$ \_\_\_\_\_ Purchase Price  
\_\_\_\_\_ Purchase Year  
\_\_\_\_\_ Percent Ownership

Is this a multi-family home?     Yes     No

If yes, list number of dwellings: \_\_\_\_\_

Do you rent this property to others?     Yes     No

If yes, list date you began renting (month/year): \_\_\_\_\_

If yes, list what percent of your home you rent: \_\_\_\_\_

If you rent to family, list name(s)/relation: \_\_\_\_\_

### 4. Other Real Estate

Do you own real estate other than the home where you reside?     Yes     No

#### Address of Property 1

(List physical address. Do NOT list P.O. Boxes.)

\$ \_\_\_\_\_ Market Value  
\$ \_\_\_\_\_ Debt  
\$ \_\_\_\_\_ Purchase Price  
\_\_\_\_\_ Purchase Year  
\_\_\_\_\_ Percent Ownership

#### Address of Property 2

(List physical address. Do NOT list P.O. Boxes.)

\$ \_\_\_\_\_ Market Value  
\$ \_\_\_\_\_ Debt  
\$ \_\_\_\_\_ Purchase Price  
\_\_\_\_\_ Purchase Year  
\_\_\_\_\_ Percent Ownership

\*If you own more than two properties, itemize each additional property on a separate sheet of paper and attach it to this form.



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### 5. Business/Farm

Do you own a business and/or farm? (Check all that apply)

Business     Farm     Neither

If you own a farm, do you live on the farm for more than 50% of the year?

Yes     No

|   |   |                                 |  |              |    |  |      |  |  |                                 |  |  |                          |  |  |                   |  |  |                     |
|---|---|---------------------------------|--|--------------|----|--|------|--|--|---------------------------------|--|--|--------------------------|--|--|-------------------|--|--|---------------------|
| <b>Address of Business/Farm 1</b><br>(List physical address. Do NOT list P.O. Boxes.) | <table style="width: 100%; border-collapse: collapse;"> <tr><td style="border-bottom: 1px solid black; width: 10%;">\$</td><td style="width: 50%;"></td><td style="width: 40%;">Market Value</td></tr> <tr><td style="border-bottom: 1px solid black;">\$</td><td></td><td>Debt</td></tr> <tr><td style="border-bottom: 1px solid black;"></td><td></td><td>Year Purchased/Opened/Inherited</td></tr> <tr><td style="border-bottom: 1px solid black;"></td><td></td><td>Business Product/Service</td></tr> <tr><td style="border-bottom: 1px solid black;"></td><td></td><td>Percent Ownership</td></tr> <tr><td style="border-bottom: 1px solid black;"></td><td></td><td>Number of Employees</td></tr> </table> | \$                              |  | Market Value | \$ |  | Debt |  |  | Year Purchased/Opened/Inherited |  |  | Business Product/Service |  |  | Percent Ownership |  |  | Number of Employees |
| \$  |   | Market Value                    |  |              |    |  |      |  |  |                                 |  |  |                          |  |  |                   |  |  |                     |
| \$  |   | Debt                            |  |              |    |  |      |  |  |                                 |  |  |                          |  |  |                   |  |  |                     |
|   |   | Year Purchased/Opened/Inherited |  |              |    |  |      |  |  |                                 |  |  |                          |  |  |                   |  |  |                     |
|   |   | Business Product/Service        |  |              |    |  |      |  |  |                                 |  |  |                          |  |  |                   |  |  |                     |
|   |   | Percent Ownership               |  |              |    |  |      |  |  |                                 |  |  |                          |  |  |                   |  |  |                     |
|   |   | Number of Employees             |  |              |    |  |      |  |  |                                 |  |  |                          |  |  |                   |  |  |                     |

|   |   |                                 |  |              |    |  |      |  |  |                                 |  |  |              |  |  |                   |  |  |                     |
|---|---|---------------------------------|--|--------------|----|--|------|--|--|---------------------------------|--|--|--------------|--|--|-------------------|--|--|---------------------|
| <b>Address of Business/Farm 2</b><br>(List physical address. Do NOT list P.O. Boxes.) | <table style="width: 100%; border-collapse: collapse;"> <tr><td style="border-bottom: 1px solid black; width: 10%;">\$</td><td style="width: 50%;"></td><td style="width: 40%;">Market Value</td></tr> <tr><td style="border-bottom: 1px solid black;">\$</td><td></td><td>Debt</td></tr> <tr><td style="border-bottom: 1px solid black;"></td><td></td><td>Year Purchased/Opened/Inherited</td></tr> <tr><td style="border-bottom: 1px solid black;"></td><td></td><td>Farm Product</td></tr> <tr><td style="border-bottom: 1px solid black;"></td><td></td><td>Percent Ownership</td></tr> <tr><td style="border-bottom: 1px solid black;"></td><td></td><td>Number of Employees</td></tr> </table> | \$                              |  | Market Value | \$ |  | Debt |  |  | Year Purchased/Opened/Inherited |  |  | Farm Product |  |  | Percent Ownership |  |  | Number of Employees |
| \$  |   | Market Value                    |  |              |    |  |      |  |  |                                 |  |  |              |  |  |                   |  |  |                     |
| \$  |   | Debt                            |  |              |    |  |      |  |  |                                 |  |  |              |  |  |                   |  |  |                     |
|   |   | Year Purchased/Opened/Inherited |  |              |    |  |      |  |  |                                 |  |  |              |  |  |                   |  |  |                     |
|   |   | Farm Product                    |  |              |    |  |      |  |  |                                 |  |  |              |  |  |                   |  |  |                     |
|   |   | Percent Ownership               |  |              |    |  |      |  |  |                                 |  |  |              |  |  |                   |  |  |                     |
|   |   | Number of Employees             |  |              |    |  |      |  |  |                                 |  |  |              |  |  |                   |  |  |                     |

\*If you own more than two businesses/farms, itemize each additional business/farm on a separate sheet of paper and attach it to this form.

### 6. Investments

Do you own investments, such as stocks, bonds, certificates of deposit, trust funds, mutual funds, etc.?  Yes     No

If yes, list the value of all investments for all parent(s) whose information is reported on this form.

\$ \_\_\_\_\_

Do you have a retirement account, such as a 401(k), 403(b) or IRA?  Yes     No

If yes, list the value of all retirement accounts for all parent(s) whose information is reported on this form.

\$ \_\_\_\_\_ Parent 1 Value

\$ \_\_\_\_\_ Parent 2 Value (if applicable)

Does the student or their sibling(s) have a college savings plan (529 plan, UTMA, UGMA)?  Yes     No

If yes, list the value of all 529 plans and the value of all UTMAs & UGMAs for all children.

| Child's Name           | Value of 529 Plan Owned by Parent(s) | Value of UTMAs & UGMAs |
|------------------------|--------------------------------------|------------------------|
| Example: Cecil Sagehen | \$20,000                             | \$10,000               |
|                        |                                      |                        |
|                        |                                      |                        |
|                        |                                      |                        |

### 7. Certification

I certify that the information reported on this form and all supporting documentation is true and accurate to the best of my knowledge. I understand that false statements or misrepresentations will be cause for denial, reduction, withdrawal and/or repayment of financial aid.

Parent Signature \_\_\_\_\_

Print Name \_\_\_\_\_

Date \_\_\_\_\_