



Household Size & Asset Form 2023-2024

Office of Financial Aid
1988 Newmark Avenue
Coos Bay, Oregon 97420
Phone: 541.888.7352 fax 541.888.7492
Email: fao@socc.edu | website: www.socc.edu

Student's Name: _____ Student ID #: _____

Dependency Status – per FAFSA

Independent Students include:

Yourself (and your spouse) and your children, if you will provide more than half of their support between July 1, 2023 and June 30, 2024. Other people can be included if they now live with you, you provide more than half of their support, and you will continue to provide more than half of their support between July 1, 2023 through June 30, 2024.

NAME	Age	Relationship to INDEPENDENT Student	If this person will attend college half-time or more in 2023-2024, print the name of the college.	Degree Seeking?
1.		Self	Southwestern Oregon Comm College	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
2.		Spouse		Yes <input type="checkbox"/> No <input type="checkbox"/>
3.		Child		Yes <input type="checkbox"/> No <input type="checkbox"/>
4.		Child		Yes <input type="checkbox"/> No <input type="checkbox"/>
5.		Child		Yes <input type="checkbox"/> No <input type="checkbox"/>
6.		Other		Yes <input type="checkbox"/> No <input type="checkbox"/>

Attach a list of the additional people if needed, providing the same information as requested above, for each.

GO TO PAGE TWO. Complete ASSET INFORMATION for Student + Student's spouse and SIGN!

Dependent Students include:

Yourself (even if you don't live with your parents), your parents, and your parents other children if your parents will provide more than half of their support from July 1, 2023 through June 30, 2024. Other people can be included if they now live with your parents, your parents provide more than half of their support, and your parents will continue to provide more than half of their support between July 1, 2023 through June 30, 2024.

NAME	Age	Relationship to DEPENDENT Student	If this person will attend college half-time or more in 2023-2024, print the name of the college.	Degree Seeking?
1.		Self	Southwestern Oregon Comm College	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
2.		Parent Listed on FAFSA		Yes <input type="checkbox"/> No <input type="checkbox"/>
3.		Parent's Spouse		Yes <input type="checkbox"/> No <input type="checkbox"/>
4.		Sibling/Step-sib		Yes <input type="checkbox"/> No <input type="checkbox"/>
5.		Sibling/Step-sib		Yes <input type="checkbox"/> No <input type="checkbox"/>
6.		Other		Yes <input type="checkbox"/> No <input type="checkbox"/>

Attach a list of the additional people if needed, providing the same information as requested above, for each.

GO TO PAGE TWO. Complete ASSET INFORMATION for Student and Parent + Parent's Spouse and SIGN (Parent and Student)!

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Asset Information – REQUIRED. Instructions below.

Please complete this form <i>based on the date you completed the FAFSA</i> . Net worth means current value minus debt. If net worth is negative, enter 0.	Student OR Student + Student's spouse	Parent + Parent's spouse
1. <i>As of the date you filled out your FAFSA</i> , what was the balance of your cash, savings, and checking accounts?	\$	\$
2. <i>As of the date you filled out your FAFSA</i> , what was the net worth of your investments?	\$	\$
3. <i>As of the date you filled out your FAFSA</i> , what was the net worth of your <i>business and/or investment farm</i> ?	\$	\$

Investments include real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc.

Investments also include qualified educational benefits or education savings accounts (e.g., Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans). For a student who does not report parental information, the accounts owned by the student (and/or the student's spouse) are reported as student investments in question 41 on the FAFSA. For a student who must report parental information, the accounts are reported as parental investments in question 89 on the FAFSA, including all accounts owned by the student and all accounts owned by the parents for any member of the household.

Investments DO NOT INCLUDE the home you live in, the value of life insurance, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings and checking accounts already reported.

Investments also DO NOT INCLUDE UGMA and UTMA accounts for which you are the custodian, but not the owner.

Investment value means the current balance or market value of these investments as of today. **Investment debt means** only those debts that are related to the investments.

Business and/or investment farm value includes the 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.

Business value DOES NOT INCLUDE the value of a small business if your family owns and controls more than 50 percent of the business and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, your family includes (1) persons directly related to you, such as a parent, sister or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law.

Investment farm value DOES NOT INCLUDE the value of a family farm that you (your spouse and/or your parents) live on and operate.

Signature and Date

Student's Signature

Date

Parent's Signature

Date

Southwestern Oregon Community College does not discriminate on the basis of race, color, gender, sexual orientation, marital status, religion, national origin, age, disability status, or protected veterans in employment, education, or activities as set forth in compliance with federal and state statutes and regulations.