



## 2020 - 2021 Investment Value Form

Student Name: \_\_\_\_\_

ID#: \_\_\_\_\_

Based on the information provided to our office and/or on your FAFSA, it appears that you (or your parent(s)/spouse) may have a rental property, business, farm or other investments. Please use this form to provide the information necessary to continue to determine your financial aid eligibility. If you are dependent, at least one of your parents must also sign and date this form.

Please provide information as of the date that your FAFSA was filed.

### Rental Property

Do you, your spouse or parents (if dependent) own a rental property?

Yes  No (If no, please skip this section)

Please indicate the address for all properties listed on Schedule E of the 2018 Federal Income Tax Return (1040). Also indicate the percentage of the property that is available for rent

Street Address	City, State, Zip	Percent Available for Rent

Required Documentation: Please provide a copy of the Schedule E from your 2018 federal returns. In addition, please provide a copy of the mortgage statement, for each property above, from the month that the FAFSA was completed.

### Business Value

Do you, your spouse or parents (if dependent) have a business listed on Schedule E of the 2018 Federal Income Tax Return (1040)?

Yes  No (If no, please skip this section)

1) What percentage of the business is owned or controlled by you or your immediate family? \_\_\_\_\_

2) How many employees does the business have? \_\_\_\_\_

If question one is greater than 50% and question two is less than 100%, then skip to the next section. If not, please provide the schedule E of your or your parent's federal income tax returns (1040), along with K-1's and form 1120S or 1065 as appropriate.

### Farm Value

Do you, your spouse or parents (if dependent) have a farm listed on Schedule F of the Federal Income Tax Return (1040)?

Yes  No (If no, please skip this section)

Do you or your parent(s) live on your farm?

YES If you live on your farm, continue to the next section.

NO If you do not, please provide Schedule F of your or your parent's federal income tax return.

*Continue on Next Page*

**Asset & Investment Value**

Do you, your spouse or parent(s) (if dependent) have investments?

- Yes  No (If no, please skip this section)

Complete this section if you or your parent(s)/spouse, have investments other than a business or farm. Investments would be related to income reported as interest, dividends, capital gains, etc. on the Federal Income Tax Return (1040). Please report the value of these investments as of the day in which the FAFSA was filed. If you or parent(s)/spouse have more than four (4) investments, please provide the information in the blank area of this form.

Source of Investment	Student/Spouse Value	Parent(s) Value
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$

**Certification and Signatures**

Each person signing below certifies that all the information provided is complete and correct. The student and one parent (if applicable) whose information was reported on the FAFSA must sign and date this form.

<b>WARNING:</b> If you purposely give false or misleading information, you may be fined, sent to prison, or both.	Student Signature:	Date:
	Spouse Signature (If applicable):	Date:
	Parent Signature (Dependent Students Only):	Date: