



2018-2019 Investment Value Form

Student Name: _____ Student ID# _____

Based on 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. If you are dependent, at least one of your parents must also sign and date this form.

Rental Property

Please complete this section if you or your parent(s)/spouse, have one or more rental properties listed on Schedule E of the Federal Income Tax Return (1040). Indicate the address of each property reported on Schedule E. Also indicate the percentage of the property that is rented out to tenants. Please use the back if you have more than two (2) rental properties.

Street Address	City, State, Zip Code	Percentage Available for Rent
_____	_____	_____
_____	_____	_____

Required Documentation: Attach a copy of your Schedule E and the mortgage statement from the month that your FAFSA was filed for each of the locations listed

Business Value

Complete this section if you or your parent(s)/spouse, have a business listed on Schedule E of the Federal Income Tax Return:

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, along with K-1's and Form 1120S or 1065 as appropriate.

Farm Value

Complete this section if you or your parent(s)/spouse, have a farm listed on Schedule F of the Federal Income Tax Return:

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 you or your parent's federal income tax return

Continue on Next Page

Other Investment Value

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. Please report the value of these investments as of the day in which the FAFSA was filed. If you or your parent(s)/spouse have more than four (4) sources of other investments, please provide the information in the blank area of this form.

Source of Investment	Current Value of Investment
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Certification and Signature

I certify that the information provided is true and correct to the best of my knowledge.

Student Signature

Date

Parent Signature (if dependent)

Date