



2023-2024 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.

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 2021 Federal Income Tax Return (1040). Please indicate the market value of the property and amount of outstanding mortgage.

Street Address, City, State, Zip	Property Value (\$)	Outstanding Mortgage (\$)

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 2021 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 2021 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 and/or your immediate family? _____%

2) How many employees does the business have? _____

Required Documentation: If question one is greater than 50% and question two is less than 100 employees, 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? 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 you (and your spouse if married) or your parent(s) federal income tax return

Asset & Investment Information

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

Yes No (if no, please skip this section)

Complete this section if you, your spouse or your parent(s), 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 on which the FAFSA was filed. If you, your spouse or your parent(s) have more than four (4) sources of other investments, please use the space below to provide information.

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

Certification and Signature

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.

Student Signature

Date

Parent Signature (if dependent)

Date