

## 2006-07 Investment Information Worksheet

This information is needed to determine the accuracy of your financial aid application. If there are differences between your application information and your documentation, we may need to make corrections on your Institutional Student Information Record (ISIR) and have a new ISIR processed. Please complete all sections. **Do not leave blanks.**

### A. Student Information

 \_\_\_\_\_  
 Last Name

 \_\_\_\_\_  
 First Name

 \_\_\_\_\_  
 M.I.

 \_\_\_\_\_  
 Social Security Number

### B. Investment Information

Please list the net worth of your investments, including commercial and rental real estate. [Investments include real estate (do not include the home you live in), trust funds, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, college savings plans, installment and land sale contracts (including mortgages held), commodities, etc. Investment value includes the market value of these investments as of \_\_\_\_\_. Investment debt is only debt related to the investments. Net worth is the investment value minus the investment debt.]

Student \$ \_\_\_\_\_ Spouse \$ \_\_\_\_\_ Parent \$ \_\_\_\_\_

**Note:** If investment value is \$0, please write a short explanation on reverse side.

### C. Sign this Worksheet - signatures required by investment owner(s).

By signing this worksheet, I (we) certify that all the information reported to qualify for Federal student aid is complete and correct.

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

 \_\_\_\_\_  
 Student's Signature

 \_\_\_\_\_  
 Date

 \_\_\_\_\_  
 Spouse (if applicable)

 \_\_\_\_\_  
 Date

 \_\_\_\_\_  
 Father/Stepfather (if applicable)

 \_\_\_\_\_  
 Mother/Stepmother (if applicable)

 \_\_\_\_\_  
 Date

**D. Complete and return** this form within three weeks of receipt of this notice so that we can continue processing the student file. Failure to do so will delay processing of your financial aid application.