

2011-12 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 you and/or your family's investments in the appropriate section(s). Investment value includes the market value of these investments as of _____. Net worth is the investment value minus the investment debt.

Commercial and rental real estate (do not include the home you live in):

Student \$ _____ Spouse \$ _____ Parent \$ _____

Trust funds and unified gift to minor act accounts:

Student \$ _____ Spouse \$ _____ Parent \$ _____

Money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities:

Student \$ _____ Spouse \$ _____ Parent \$ _____

Coverdell savings accounts, 529 college savings plans, refund value of 529 state prepaid tuition plans:

Student \$ _____ Spouse \$ _____ Parent \$ _____

Installment, land sale contracts (including mortgages held), commodities:

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.

FOR OFFICE USE ONLY

 Date Received Initials