

Parent's Investment Verification Form 2009-2010

Student's Name (please print) _____

In reviewing your son/daughter's application for aid and/or your tax return, it appears you earned a substantial amount of interest income. However, it does not appear that you reported asset values that would have generated that income.* Please provide answers to the following with amounts relevant as of the date you signed the FAFSA.

(If net worth is one million or more, enter \$999,999. If negative, enter \$0)

Current net worth (value minus debt) of investments owned by you, the parent: \$ _____

Current net worth (value minus debt) of business owned by you, the parent: \$ _____

Current net worth (value minus debt) of investment farm owned by you, the parent: \$ _____
(do **not** include a farm that you live on and operate)

For the purposes of this worksheet, **Net Worth** means current value minus current debt.

Investments include real estate (other than the home you live in), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, bonds, other securities, Education IRAs, installment and land sale contracts (including mortgages held), commodities, 529 College Savings Plans, Coverdell savings accounts, or the refund value of prepaid tuition plans, etc. **Investment value** includes the market value of these investments. Do not include the value of life insurance or retirement plans (pension funds, annuities, non-Education IRAs, Keogh plans, etc.). **Investment debt** means only those debts that are related to the investments.

Business value includes the market value of land, buildings, machinery, equipment, and inventory. Do not include the value of a small business that you, the parent, own and control and that has 100 or fewer full time employees.

Business debt means only those debts for which the business was used as collateral.

*If you had taxable or non-taxable interest or dividend earnings from investments, but those assets had been sold or shifted to another family member before you filed for aid, please explain:

Parent Signature _____

Return to: Buena Vista University
Financial Assistance Office
610 West 4th St.
Storm Lake, IA 50588