

2017- 2018 Assets & Investments Information for Dependent Students

You are required to fill out this form because you indicated on your Free Application for Federal Student Aid (FAFSA) that you and/or your parent(s) have assets or investments. If your parents are recently divorced or legally separated, and your parents have jointly owned assets, report your custodial parent’s portion only. If a section does not pertain to you, please indicate zero or not applicable (N/A). **Do not leave any spaces blank.**

SECTION 1: STUDENT INFORMATION

_____ First Name _____ Student Identification Number _____

SECTION 2: PARENT(S) INFORMATION

_____ Parent 1 Name _____ Parent 2 Name *(if applicable)* _____

SECTION 3: CASH, SAVINGS AND CHECKING ACCOUNTS

Please list assets as of **FAFSA filing date**. Do not include current balance.

	Student	Parent(s)
Cash	\$ _____	\$ _____
Savings	\$ _____	\$ _____
Checking Accounts	\$ _____	\$ _____

SECTION 4: OTHER REAL ESTATE

List the net worth of all other real estate you/your parent(s) own or are purchasing, including rental property, land, vacation homes, second homes, timeshares, or multi-family dwellings you may own as of the FAFSA filing date. To find the net worth take the current value (available on zillow.com or trulia.com) and subtract the amount still owed on the property. **Do not include your primary residence (i.e. your home).** List the full addresses of all the properties owned:

Address	Net Worth
_____	\$ _____
_____	\$ _____
_____	\$ _____

SECTION 5: BUSINESS INVESTMENTS

Do not include a business with **100 or fewer full-time** or full-time equivalent employees.

	Student	Parent(s)
What is the value of the business investments owned, including the market value of the buildings, equipment, inventories, etc.?	\$ _____	\$ _____
What is the total debt against the business investments owned?	\$ _____	\$ _____
What is the total net worth of the business investments?	\$ _____	\$ _____

SECTION 6: FARM INVESTMENTS

Do not include a farm with **100 or fewer full-time** or full-time equivalent employees.

	Student	Parent(s)
What is the value of the farm investment owned, including the market value of the land, the buildings, the machinery, equipment, livestock, inventories, etc.?	\$ _____	\$ _____
What is the total debt against the farm investments owned?	\$ _____	\$ _____
What is the total net worth of the farm investments?	\$ _____	\$ _____

SECTION 7: NET WORTH OF INVESTMENTS

To find the net worth, subtract the debt from the value of the investment as of the FAFSA filing date. **Do not include** the value of life insurance, retirement plans (401(k), pensions, annuities, non-education IRAs, Keogh plans, etc.)

	Student	Parent(s)
Bonds, Trust Funds, Partnerships	\$ _____	\$ _____
Mutual Funds, Stocks and Other Securities	\$ _____	\$ _____
Certificates of Deposits, Money Market Accounts	\$ _____	\$ _____
Commodities/Precious Metals (value of your portion)	\$ _____	\$ _____
Corporation (value of your portion)	\$ _____	\$ _____
Installment of land sale contracts including mortgages held	\$ _____	\$ _____
Coverdell Education Savings Plans (owned by parent(s) or student)	\$ _____	\$ _____
529 Education Savings Plans (owned by parent(s) or student)	\$ _____	\$ _____
Other investments owned	\$ _____	\$ _____
TOTAL	\$ _____	\$ _____

SECTION 8: CERTIFICATION AND SIGNATURES

If you are the student or parent, by signing this application you certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked, to provide further documentation that will verify the accuracy of your completed form. Also, you certify that you understand that the Department of Education has the authority to verify information reported on this form with the Internal Revenue Service and other federal agencies. If you purposely give false or misleading information, you may be fined up to \$20,000, sent to prison, or both.

Student Signature

Date

Parent Signature (if applicable)

Date

You may scan and submit your completed form by email to finaid@ucr.edu
 or by fax to (951) 827-5619
 or drop off at the Highlander One Stop Shop
 or mail to UC Riverside Financial Aid Office, 900 University Avenue, Riverside, CA 92521