

## 2017- 2018 Assets & Investments Information for Independent 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 spouse have assets or investments. If you and your spouse are recently divorced or legally separated, and you have jointly owned assets, report your 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: SPOUSE INFORMATION

\_\_\_\_\_ Spouse Last Name (if applicable) \_\_\_\_\_ Spouse First Name (if applicable) \_\_\_\_\_

### SECTION 3: CASH, SAVINGS AND CHECKING ACCOUNTS

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

	Student	Spouse
Cash	\$ _____	\$ _____
Savings	\$ _____	\$ _____
Checking Accounts	\$ _____	\$ _____

### SECTION 4: OTHER REAL ESTATE

List the net worth of all other real estate you/your spouse 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	Spouse
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	Spouse
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	Spouse
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 spouse or student)	\$ _____	\$ _____
529 Education Savings Plans (owned by spouse or student)	\$ _____	\$ _____
Other investments owned	\$ _____	\$ _____
<b>TOTAL</b>	<b>\$ _____</b>	<b>\$ _____</b>

**SECTION 8: CERTIFICATION AND SIGNATURES**

If you are the student or spouse, 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**

\_\_\_\_\_  
**Spouse Signature (if applicable)**

\_\_\_\_\_  
**Date**

You may scan and submit your completed form by email to [finaid@ucr.edu](mailto: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