2020/2021
REAL ESTATE AND INVESTMENT VERIFICATION
_____ Parent _____ Student/Spouse

As of the date you completed your FAFSA, please read and complete the following:
On your 2018 IRS Tax Return Transcript, you reported dividend income or income (or loss) from real estate
(other than your home). However, the figures you reported as investments including real estate on your
FAFSA are inconsistent with your tax return. Please revisit this information as of the date you filed your
FAFSA by completing this form.

Investments include real estate (do not include the home you live in – for multifamily dwellings exclude the
unit you live in but include the rest of the dwelling), rental property (includes a unit in a family home that
has its own entrance, kitchen, and bath rental to someone other than a family member), trust funds, UGMA and
UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other
securities, Coverdell savings accounts, 529 college savings plans, the refund value of 529 state prepaid tuition
plans, installment and land sale contracts (including mortgages held), commodities, etc. For more information
about reporting education savings plans, call 1-800-433-3243. Investment value means the current balance or
market value of these investments as of the date you completed your FAFSA. Investment debt means only
those debts that are related to the investments.

Investments do not include the home you live in (for multifamily dwellings exclude the
unit you live in but include the rest of the dwelling), cash, the value of life insurance, retirement plans (pension funds,
annuities, noneducation IRAs, Keogh plans, etc.), or cash, savings, and checking accounts already reported
elsewhere on the FAFSA.

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<tr>
<th>Address</th>
<th>Value</th>
<th>Debt</th>
<th>Net Value (Value - debt)</th>
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OTHER INVESTMENTS (Name of company and net value of investment):
Name of Company
_____________________________
_____________________________
_____________________________

Net Value of Investment
$__________________________
$__________________________
$__________________________

I/we certify that the above information is complete and correct. Do not leave any blanks. If not complete this
form will be returned to you.

SIGNATURE (student)_________________________ DATE:_________________

SIGNATURE (parent)_________________________ DATE:_________________