



WORCESTER
S T A T E
UNIVERSITY

Financial Aid
Phone: 508-929-8056
Fax: 508-929-8194

NAME: _____

ID#: _____

FAC20SIV (student) FAC20PIV (parent)

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.

REAL ESTATE (Address, value and debt)

Address	Value	Debt	Net Value (Value - debt)
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____

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: _____