



WORCESTER
S T A T E
UNIVERSITY

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

NAME: _____

ID#: _____

FAC22SIV (student) FAC22PIV (parent)

2022/2023

REAL ESTATE AND INVESTMENT VERIFICATION

_____ Parent _____ Student/Spouse

As of the date you completed your FAFSA, please read and complete the following: On your 2020 IRS Tax Return (or 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 rented 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, installment and land sale contracts (including mortgages held), commodities, qualified educational benefits or education savings accounts (e.g., Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans). For a student who does not report parental information, the accounts owned by the student (and/or the student’s spouse) are reported as student investments in question 41. For a student who must report parental information, the accounts are reported as parental investments in question 89, including all accounts owned by the student and all accounts owned by the parents for any member of the household. For more information about reporting education savings plans, call 1-800-433-3243.

Net worth means the current value, as of today, of investments, businesses, and/or investment farms, minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use 0 for investments or properties with a negative value.

Investments do not include the home you live in, the value of life insurance, ABLE accounts, retirement plans (401[k] plans, pension funds, annuities, non-education 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: _____