



2019-2020 Assets & Investments Information

This form may be submitted by mail, fax or in person.

Office of Financial Aid
1950 Third Street
La Verne, CA 91750

(800) 649-0160 phone
(909) 448-1629 fax
finaid@laverne.edu

You are required to fill out this form because you indicated you, your spouse (independent students) and/or your parents (dependent students) have assets or investments. If you or your parents are divorced or separated and you or your parents had jointly owned assets, report only your or your parents' portion. **If a section does not pertain to you please indicate zero or not applicable (NA). We cannot process your financial aid until you submit all the required verification documents. You may view all outstanding requirements on your My La Verne portal. Failure to complete the verification process in a timely manner may result in the loss of aid.**

STUDENT INFORMATION

Last Name

First Name

La Verne ID Number:

ASSETS

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

| | Student/Spouse | Parents |
|-------------------|----------------|----------|
| Cash | \$ _____ | \$ _____ |
| Savings | \$ _____ | \$ _____ |
| Checking Accounts | \$ _____ | \$ _____ |

OTHER REAL ESTATE

List the net worth of all other real estate you 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 from IRS Form 1040, Schedule E below:

| Address | Net Worth |
|---------|-----------|
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |

FARM INVESTMENTS

Do not include the farm on which your live or operate.

| | Student/Spouse | Parents |
|--|----------------|----------|
| 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? | \$ _____ | \$ _____ |

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

Comments regarding your or your parents assets:

CERTIFICATION AND SIGNATURES

By signing this form, I affirm that all information on this form and any attachments are complete and accurate to the best of my knowledge. I understand that any false statements or misrepresentation may be cause for denial, reduction, withdrawal, and/or repayment of financial aid, and I may be subject to a fine, imprisonment or both, under provisions of the United States criminal code.

Please note a “wet” (physical) signature is required. You need to print out the form to sign.

Student _____ **Date** _____

Parent* _____ **Date** _____

** For dependent students only*