

University of La Verne

2019-2020 Assets & Investments Information

Office of Financial Aid | 1950 Third Street | La Verne, CA 91750 | Phone: (800) 649-0160 | Fax: (909) 448-1629

You are required to fill out this form because you indicated you, your spouse (independent student) 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 you 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?	\$ _____	\$ _____

La Verne ID Number _____

NET WORTH 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*