

2009-2010 Request for Cash and Investment Values - Student

RETURN TO: CAL POLY FINANCIAL AID OFFICE SAN LUIS OBISPO, CA 93407-0201 FAX: (805) 756-7243	Last Name: _____
	First Name: _____ Empl ID#: _____
	Phone #: _____

In order to complete the review of your financial aid eligibility for the 2009-10 school year, please answer the questions below, sign and return this form to the Financial Aid Office within 10 days.

1) As of the date the FAFSA was filed, report the total balance of cash/checking/savings accounts \$ _____

Investments include real estate, trust funds, money market funds, mutual funds, certificates of deposit, stocks, bonds, other securities, Coverdell savings accounts, 529 college savings plans, installment and land sale contracts (including mortgages held), commodities, etc. Investment value means the current balance or market value of these investments as of your FAFSA filing date. Investment debt means only those debts that are related to the investments. **Do not include** the value of life insurance, retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings, and checking accounts already reported.

2) Net Worth of Investments \$ _____

3) Net Worth of Real Estate Investment Property:

Please list complete information for all real estate you own *other than your primary residence*.

Property 1:

Current Market Value \$ _____ Debt Owed \$ _____

Property Address:

Property 2:

Current Market Value \$ _____ Debt Owed \$ _____

Property Address:

For additional properties, please list on separate piece of paper and attach.

Total Current Market Value of ALL Property (Property 1 + Property 2, etc.)..... \$ _____

Minus Total Debt of ALL Property (Property 1 + Property 2, etc.)..... - \$ _____

Equals Total Net Worth of ALL Real Estate Investment Property..... \$ _____

4) Net Worth of Business \$ _____

Business investment includes the market value of land, buildings, machinery, equipment, inventory, vehicles, supplies, etc. Business investment debt means only those debts for which the business was used as collateral. **Do not include the value of a small business that you own and control and have 100 or fewer full-time employees.**

5) Net Worth of Farm Investments \$ _____

Farm investment includes the market value of land, buildings, machinery, equipment, inventory, vehicles, supplies, etc. Farm investment debt means only those debts for which the farm was used as collateral. **Do not include the value of a family farm that you live on and operate.**

Note: Net worth means current market value minus debt owed.

SIGN AND DATE

I hereby certify that all information reported on this form and any attachments is true, complete, and accurate as of the date the FAFSA was filed. False statements or misrepresentation will be cause for denial, reduction, withdrawal, and/or repayment of financial aid.

Signature (Student)

Date

Spouse Signature (optional)

Date