REAL ESTATE & INVESTMENT CLARIFICATION FORM
2015-2016 ACADEMIC YEAR

Please note: All information reported on this form should reflect information as of the date you filed and signed your FAFSA. For example, if you signed your FAFSA on 2/15/2015, and you are answering question #1 please list the balance of cash, savings and checking accounts as of 2/15/2015.

Student's Name_______________________________________________________________________________

Student Number________________________SS#____________________________________________________

Date FAFSA Signed: _______________________

1. Report the balance of cash, and all savings and checking accounts as of the following date. Do not include student Financial Aid.

   PARENTS’                                STUDENT’S AND SPOUSE’S
   Account balance: $___________   Account balance: $___________

2. Report the net worth of investments (include real estate (DO NOT INCLUDE THE HOME YOU LIVE IN), 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. Net worth is the value minus the debt.

   PARENTS’                                STUDENT’S AND SPOUSE’S
   Value of Investment: $___________   Value of Investment: $___________

3. Indicate the net worth of rental property and other real estate (if any) and the related indebtedness as of the following date. DO NOT INCLUDE THE VALUE OF YOUR PRIMARY RESIDENCE. Investment value means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments.

   PARENTS’                                STUDENT’S AND SPOUSE’S
   Value of Property: $___________   Value of Property: $___________
   Indebtedness: $___________   Indebtedness: $___________
   (DO NOT INCLUDE THE VALUE OF YOUR PRIMARY RESIDENCE).

4. Parental/Student comments are welcome if they can assist in clarifying the difference between the interest and dividend income reported on the 2014 U.S. Income Tax Return and the amount of cash, savings and investments reported on the FAFSA. _______________________________________________________________________________________
   _______________________________________________________________________________________
   _______________________________________________________________________________________

I certify the above information is true and correct to the best of my knowledge

________________________________________  _________________________________________________
Father’s Signature        Date  Mother’s Signature   Date

_______________________________________  __________________________________________________
Student’s Signature  Date  Spouse’s Signature   Date

Please return this form to:

Bucks County Community College   Financial Aid Office   275 Swamp Road   Newtown, PA 18940
215 968-8200   Fax 215 504-8522 Email finaid@bucks.edu

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