

**REAL ESTATE & INVESTMENT CLARIFICATION FORM  
2017-2018 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 2/15/2017, and you are answering question #1 please list the balance of cash, savings and checking accounts as of 2/15/2017.

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 2015 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**