

Name (Last, First): \_\_\_\_\_ SUA ID #: \_\_\_\_\_

Date: \_\_\_\_\_ Cell Phone #: \_\_\_\_\_

**You must complete all application sections. Do not leave any question or amount response blank. If a question does not apply, write "N/A" (for Not Applicable) where a response is requested or "0" if an amount is requested. Forms submitted with blanks will be considered incomplete and may delay receipt of financial aid.**

**SECTION A: Total Cash, Savings, Checking, and Investments**

1) Total of Cash, Savings, and Checking Account Balances: \$ \_\_\_\_\_

2) Total of Investment Accounts (see listing below): \$ \_\_\_\_\_

*NOTE: Investments include trust funds, UTMA/UGMA accounts, money market funds, mutual funds, certificates of deposit, stocks, bonds, commodities, and other securities. Include the value of all qualified education accounts such as Coverdell savings accounts, 529 college savings plans, and refund values of 529 pre-paid tuition plans. DO NOT include the value of life insurance and retirement plans (e.g., pension funds, annuities, non-education IRAs, etc.)*

**SECTION B: Real Estate**

DO NOT include your parent's primary residence. Please list complete information for any other real estate your parents own (e.g., mobile homes, condos, duplexes, rental property, land, summer homes, etc.) Include an additional page, if needed. (Investment debt is comprised only of debt that is related to real estate investments.)

<b>Property Address #1:</b> _____			
(Street Address)	(City)	(State)	(ZIP Code)
Purchase Price: \$ _____ Mortgage Balance: \$ _____ Market Value: \$ _____			

<b>Property Address #2:</b> _____			
(Street Address)	(City)	(State)	(ZIP Code)
Purchase Price: \$ _____ Mortgage Balance: \$ _____ Market Value: \$ _____			

<b>Property Address #3:</b> _____			
(Street Address)	(City)	(State)	(ZIP Code)
Purchase Price: \$ _____ Mortgage Balance: \$ _____ Market Value: \$ _____			

Name (Last, First): \_\_\_\_\_ SUA ID #: \_\_\_\_\_

**SECTION C: Business, Partnership, and Corporation Values**

**1) Business Information**

Please state the name, value, and nature of each business (product or service) your parents own as of the date your 2019-2020 FAFSA form was completed. Include the value of the land, buildings, machinery, equipment, inventories, etc. List the debt held on each business. Include only the present mortgage balance and related debts for which the business(es) are used as collateral. If the business is a farm and your parents reside at the property, you do not need to report the farm. Please use an additional sheet of paper if necessary.

Business Name & Nature: \_\_\_\_\_

Business Market Value (what is it worth today): \$ \_\_\_\_\_

Business Debt (what is owed): \$ \_\_\_\_\_

Number of full-time employees: \_\_\_\_\_

Do your parents have a controlling interest in the business?     Yes             No

Does your parents' business involve real estate ownership?     Yes             No

If the business value is less than the unpaid business debt, please explain. If the business has been sold, please provide verification of sale, and gain or loss information:

\_\_\_\_\_

\_\_\_\_\_

Name (Last, First): \_\_\_\_\_ SUA ID #: \_\_\_\_\_

**2) Partnership Information**

Please provide the following information from the 2017 Form 1065 - U.S. Partnership Return. Include information from Schedules K and L for each Partnership/Sub Chapter S Corporation listed on Schedule E of your parents' 2017 federal tax return. If more than one partnership is listed on the income tax form, list additional partnership(s) on a separate page with all requested information.

Partnership Name: \_\_\_\_\_

Partnership Market Value (100%): \$ \_\_\_\_\_

Partnership Debt (100%): \$ \_\_\_\_\_

Percentage of your parents' share: \_\_\_\_\_%

Number of full-time employees: \_\_\_\_\_

Do your parents have a controlling interest in the partnership?  Yes  No

Does your parents' partnership involve real estate ownership?  Yes  No

If the partnership debt is greater than its values, please explain:

\_\_\_\_\_  
\_\_\_\_\_

Name (Last, First): \_\_\_\_\_ SUA ID #: \_\_\_\_\_

**3) S Corporation Information**

Please provide the following information from the 2017 Form 1120S - US Income Tax Return for an S Corporation. Include information from Schedules A through M, and all K-1 schedules for each S Corporation listed on Schedule E of your parents' 2017 federal tax return. List additional corporation(s) on a separate page and include all requested information.

S Corporation Name: \_\_\_\_\_

S Corporation Market Value (100%): \$ \_\_\_\_\_

S Corporation Debt (100%): \$ \_\_\_\_\_

Percentage of parents' share: \_\_\_\_\_%

Number of full-time employees: \_\_\_\_\_

Do your parents have a controlling interest in the corporation?  Yes  No

Does your parents' S Corporation involve real estate ownership?  Yes  No

If the corporation debt is greater than the values, please explain:

\_\_\_\_\_  
\_\_\_\_\_

**SECTION C: Signature(s)**

By signing this form you certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked, to provide information that will verify the accuracy of your completed form.

\_\_\_\_\_  
Student Name (print) Signature Date

\_\_\_\_\_  
Parent Name (print) Signature Date

(This form requires handwritten signatures. Photocopies of handwritten signatures are permitted. Electronic, or typed, signatures will not be accepted.)  
Please e-mail, mail, or deliver this form in person to the address below. Please write your ID# on attached or supporting documents.