

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 parent primary residence! Please list complete information for any other real estate owned by parents (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.)

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

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

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

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SECTION C: Business, Partnership, and Corporation Values

1) Business Information

Please state the name, value, and nature of each business (product or service) parents own as of the date the student's **2023-2024** 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 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 parents have a controlling interest in the business? ☐ Yes ☐ No

Does 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:

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2) Partnership Information

Please provide the following information from the 2021 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 parent's 2021 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 parent's share: _____%

Number of full-time employees: _____

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

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

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

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3) S Corporation Information

Please provide the following information from the 2021 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 parents' 2021 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 parents have a controlling interest in the corporation? ☐ Yes ☐ No

Does 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.