



# Business and Investment Values Worksheet

Dependent

BI  
2010-2011

_____	_____	_____
Student Applicant's Last Name	First Name	Middle Initial
_____	_____	
Social Security Number	Birthdate	
_____	_____	_____
E-mail Address	Telephone #	Cell Phone #

Note: Students and parents will use their tax returns for completion of this form. Only a copy of this form will be retained by the Financial Aid Office.

- \* if the student has not filed a 1040, or if the student has no values listed for the relevant lines, then use the parent(s) tax forms to complete this worksheet.
- \*If neither the student nor parent have any values listed for these lines, please fill out the form with zero's (0) and return it to the Financial Aid Office.
- \*If both student and parent(s) have values listed for the relevant lines, please complete one form for the student and one for the parent, and return both to the Financial Aid Office.

### Taxable Interest

The amount of taxable interest listed on line 8a of the tax return(s) was \$ \_\_\_\_\_.

The current balance of all accounts that generated this interest is \$ \_\_\_\_\_.

### Business Net Worth

The profit or loss indicated on line 12 of the tax return(s) was \$ \_\_\_\_\_.

The type of business is/was \_\_\_\_\_ (occupation).

If that business were sold today, I/we would receive \$ \_\_\_\_\_ for it after all debts were cleared (current assets minus current liabilities and debts).

**If this is a family owned/controlled business employing fewer than 100 people, assume \$0 value.**

### Investment Value

The profit or loss listed on line 17 of the tax return(s) was \$ \_\_\_\_\_.

If that investment(s) were sold today, I/we would receive \$ \_\_\_\_\_. This is its current value.

*By signing this form, I affirm that all information on this form and any attachments are complete and accurate to the best of my knowledge. If requested, I agree to provide documentation to support the information I have provided on this form. I understand that any false statements or misrepresentation may be cause for denial, reduction, withdrawal, and/or repayment of financial aid, and I may be subject to a fine, imprisonment, or both, under provisions of the United States Criminal Code.*

_____	_____
Student Signature	Date
_____	_____
Parent Signature	Date
_____	_____
Parent Cell Phone Number	Parent Email Address