



## Business and Investment Values Worksheet

Independent

BI  
2010-2011

\_\_\_\_\_  
Student Applicant's Last Name                      First Name                      Middle Initial

\_\_\_\_\_  
Social Security Number                      Birthdate

\_\_\_\_\_  
E-mail Address                      Telephone #                      Cell Phone #

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

**Note: If you are single or married filing jointly, please refer to your 1040 for the tax lines mentioned. If you are married filing separately, add the totals of yourself and your spouse together to complete the worksheet.**

### 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).

This business belongs to:     Student     Spouse     Both

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

Does this business have less than 100 full time employees?     Yes     No

### 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.

If you have an amount on line 17, you **CANNOT** enter "0".

*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

\_\_\_\_\_  
Spouse Signature

\_\_\_\_\_  
Date