



2011-2012 Verification: 2010 Real Estate & Investments
OFFICE OF STUDENT FINANCIAL PLANNING

PARENT/STUDENT

INDEPENDENT STUDENT/SPOUSE

Student Name: _____ Concordia ID **H** _____

Your 2010 federal income tax form indicates real estate and/or investment ownership.

This document is required to verify the “Net worth of your (and parent or and spouse, if married) investments, including real estate, that is required on your FAFSA application submitted to the U.S. Department of Education. Net worth means current value minus debt.

Real estate includes: rental property, land, second homes, or summer homes (*It does not include your primary residence*).

Investments include: trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds and 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, other than primary residence where you live), and commodities. Investments do not include the home you live in, the value of life insurance, retirement plans (pension funds, annuities, non-education IRAs and Keogh plans) or cash, savings and checking accounts reported elsewhere on the FAFSA application.

Complete this document and return it to the Office of Student Financial Planning within 7 days from the request date.

REAL ESTATE

Location of property/ies: _____

Current value of property: _____ MINUS Amount Owed on Property: _____ = Net Worth: _____

Current value of property: _____ MINUS Amount Owed on Property: _____ = Net Worth: _____



INVESTMENTS:

Type of Asset	Number of Units	Value Per Unit	Total Value
<i>Example: XYZ Company Stock</i>	10	\$100	\$1,000

By signing this worksheet, I certify that all of the information reported is true, complete and accurate. I understand that additional information and/or documentation may be required to verify my response.

Parent/Independent Student Signature

Date

*Return To: Concordia University Chicago, Student Financial Planning, 7400 Augusta St., River Forest, IL 60305
Office: (708) 209-3113 / Fax: (708) 488-4102*