2017-2018 Assets, Investments and Property Statements

You are required to fill out this form because you indicated on your Free Application for Federal Student Aid (FAFSA) that you and/or your parent(s) have assets or investments. If your parents are recently divorced or legally separated, and your parents have jointly owned assets, report your custodial parent’s portion only. If a section does not pertain to you, please indicate zero or not applicable (N/A). Do not leave any spaces blank.

STUDENT INFORMATION

____________________________________ ____________________________________ _______________
Last Name

_____________________
First Name     MI

____________________________
EMPL ID

_______________________________@myhunter.cuny.edu
Hunter Email

ASSETS AND INVESTMENTS STATEMENT

Most assets are investments such as college savings plans, Coverdell education savings accounts, 529 college savings plans (including refunds from prepaid 529 plans and plans owned by someone other than you or your parents), real estate, installment and land sale contracts (including mortgages held), trust funds, mutual funds, money market funds, UGMA and UTMA accounts, certificates of deposit, stocks, stock options, bonds, commodities, and precious metals. If the asset isn't a business or investment farm, it is reported as an investment. Indicate the current value of your investments, as of the date the FAFSA was filed, minus any debt. Investment value means the current balance or market value of these investments as of the date this form was signed. Investment debt means only those debts that are related to the investment. For all negative numbers, enter zero “0”.

Do not include:

- Possessions such as a car, a stereo, clothes, or furniture
- A family's principal place of residence, even if it is part of a business
- A family farm (including equipment, livestock, etc.) if:
  1. it is the principal place of residence for the applicant and his/her family (spouse or, for dependent students, parents),
   AND
  2. the applicant (or parents of a dependent student) materially participated in the farming operation.
- Family-owned and controlled small businesses

<table>
<thead>
<tr>
<th>Assets and Investments</th>
<th>Value of Asset</th>
<th>Debt Remaining</th>
<th>Total</th>
<th>Value of Asset</th>
<th>Debt Remaining</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash, Savings, and Checking Accounts</td>
<td>$</td>
<td></td>
<td>$</td>
<td>$</td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>Investments and Real Estate (As defined by the FAFSA instructions)</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>S-Corp</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Partnership</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>What percentage of the S-Corp and/or Partnership do you own?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
RENTAL PROPERTY NET VALUE STATEMENT

Your 2015 tax return shows income (or loss) from rental real estate. You did not report the “net worth” of your rental real estate in #42 or #91 of your FAFSA. (Complete a form for each property if you, your spouse, and/or your parent(s) own more than one.) The figures should reflect values as of the date the FAFSA was signed.

<table>
<thead>
<tr>
<th>The requested information is for:</th>
<th>☐ Student</th>
<th>☐ Spouse</th>
<th>☐ Parent(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The rental property address:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Street</td>
<td>City</td>
<td>State</td>
<td>Zip Code</td>
</tr>
</tbody>
</table>

The rental property is: ☐ One Family House ☐ Two Family House ☐ Other ___________

NOTE: If you rent a portion of your home, please include only the percentage that is rented. For example, if half of your home is rented, use 50% of the current market value minus 50% of the mortgage owed to calculate the “net value”. In order to calculate the “net value”, go through the following steps:

1. What percentage of your home is rental property?
   - ☐ 100 %
   - ☐ 50%
   - ☐ Other: ____%

2. What is the Market Value: $__________________
   (If the property is located in the New York City area, please utilize the Public Record website for the current market value: [http://webapps.nyc.gov:8084/CICS/fin1/find001](http://webapps.nyc.gov:8084/CICS/fin1/find001))

3. Do you have a mortgage on this property?
   - ☐ Yes
   - ☐ No

4. If yes, how much do you still owe on the mortgage? $__________________
   (Please submit the mortgage statement for the month you filed the FAFSA)

What is the Net Value: $__________________
(Market valued minus mortgage)

CERTIFICATION AND SIGNATURES

SIGNATURE (s) - All parties providing information MUST sign below.

I (we) certify that all of the information provided on this form is accurate and complete. I understand that the Financial Aid Office may request additional documentation to verify the above information.

Note: if you are a dependent student, you and a parent must sign this form.

Student’s Signature: ___________________________ Date: ___________

Parent’s Signature: ___________________________ Date: ___________