

Business and Investment Values Worksheet
(please print clearly)

Name: _____

Social Security Number: _____ - _____ - _____

Note: When completing this worksheet, please return tax forms for both the student and the parents.

- 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 form(s) to complete this worksheet.
- If neither the student nor parents have values listed for these lines, please complete the form with zeros and return it to the Student Financial Services Office.
- If both the student and parents have values listed for the relevant lines, please complete one form for the student and one for the parent and return both to the Student Financial Services 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 \$_____.

This business belongs to: _____ Student _____ Mother _____ Father

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).

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 can not enter "0".

Student Signature: _____ Date: _____

Parent Signature: _____ Date: _____