

Business and Investment Values Worksheet
(please print clearly)

Name: _____

Social Security Number: _____ - _____ - _____

Note: If you are single or married filing jointly, please refer to the 1040 for the tax lines mentioned. If you are married filing separately, add the totals for 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 \$_____.

This business belongs to: _____ Student _____ Spouse

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: _____

Spouse Signature: _____ Date: _____