

# Student: Investments, Business, Farm & Savings Form

2009-10

**Return to:** Office of Financial Aid & Scholarships  
 California State University, Bakersfield  
 48 SA  
 9001 Stockdale Highway - Bakersfield, CA 93311-1022  
 Telephone: (661)654-3016 FAX: (661)654-6800  
 Web: <http://www.csub.edu/finaid> E-Mail: [finaid@csub.edu](mailto:finaid@csub.edu)



Financial Aid Applicant Information:

Student Name: \_\_\_\_\_ (Please Print) CSUB Id: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

You have reported an unusually low amount of assets on your FAFSA (questions 41 – 43) as compared to your federal tax return data. **Please complete this form and return it to our office immediately so we may complete your financial aid need analysis for the 2009-10 academic year.**

Source of Asset	Number of Employees	Value of Asset	Debt on Asset
Investments			
Business			
Farm			
Cash, savings and/or checking accounts			
<b>Total</b>			

**Investments:** Enter your (and spouse) current estimated market value of investment and the debt on investment. Investment assets include all real estate<sup>1</sup> other than my primary place of residence, trust funds, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, education IRAs, college savings plans, installment and land sale contracts, commodities, etc. **Do not include** cash, savings, checking, life insurance, retirement plans, pension funds, or prepaid tuition plans.

**Business:** Enter your (and spouse) current estimated market value<sup>2</sup> of your business(es) and the debt on the business(es), including only those debts for which the business was used as collateral. Business assets include all land, buildings, machinery, equipment, inventory, etc. held by the business(es).

**Farm:** Enter your (and spouse) current estimated market value<sup>3</sup> of your farm(s) and the debt on the farm(s), including only those debts for which the farm was used as collateral. Farm assets include all land, buildings, machinery, equipment, inventory, etc. held by the farm excluding your house of primary residence

**Cash, savings and/or checking accounts:** Enter your (and spouse) current combined balance of cash, savings<sup>4</sup>, and checking accounts as of today.

**READ BEFORE SIGNING**

By signing this document, I certify that the above information is true and accurate to the best of my knowledge. I also understand that, if asked, I will provide documentation that will verify the accuracy of the information that I have entered on this form. I also understand that if I purposely give false or misleading information I may be fined \$20,000, sent to prison, or both, according to Federal Student Aid regulations.

Spouse Signature (if married): \_\_\_\_\_ Date: \_\_\_\_\_

<sup>1</sup> A conservative estimate of real estate value is 85-times your property tax amount.

<sup>2</sup> A general estimate of Business Value is approximately (current assets + fixed assets).

<sup>3</sup> A general estimate of Farm Value is approximately (current assets + fixed assets).

<sup>4</sup> A general estimate of total savings is approximately (interest income as reported on your tax forms divided by the appropriate interest rate).