

Financial Aid and Scholarships

University of California • Irvine

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2012-13 Parent Asset Information

Please complete only those sections that have been requested. Use the value of your **parent's** assets as of the day you filed your original FAFSA.

Section A - Total cash, savings and checking account balances: \$ _____

Section B - Investments: include trust funds, UTMA/UGMA Accounts, money market funds, mutual funds, certificates of deposit, stocks, bonds, commodities, and other securities. Include the value of all qualified education accounts such as Coverdell savings accounts, 529 college savings plans and refund value of 529 prepaid tuition plans. Do not include the value of life insurance and retirement plans (pension funds, annuities, non-education IRA's, etc) .
\$ _____

Section C - Real Estate Investments: Please list complete information for all of the real estate your parents own (mobile homes, condos, duplexes, rental property, land, summer homes, etc.). Include an additional page if needed. Investment debt means only those debts that are related to the investments. *Do not include your primary parents' residence.*

Property Address #1: _____
street address city state zip code
Purchase Date: _____ Purchase Price \$ _____ Unpaid Mortgage \$ _____ Market Value \$ _____

Property Address #2: _____
street address city state zip code
Purchase Date: _____ Purchase Price \$ _____ Unpaid Mortgage \$ _____ Market Value \$ _____

Property Address #3: _____
street address city state zip code
Purchase Date: _____ Purchase Price \$ _____ Unpaid Mortgage \$ _____ Market Value \$ _____

Total Current Market Value of all Property \$ _____

Total Debt of all Property \$ _____

Section D - Businesses (including self-employment) and/or Investment Farms:

Please state the nature of each business (product or service) and the value of each business as of the date your 2012-2013 FAFSA was completed. Include the value of the land, buildings, machinery, equipment, inventories, etc. Also indicate the debt on each business. Include only the present mortgage and related debts for which the business(es) are used as collateral. If the business is a farm and your parents reside there, you do not need to report the farm. Please use an additional sheet of paper if necessary.

Business Name: _____

Business Market Value (what is it worth today): \$ _____

Business Debt (what is owed): \$ _____

Number of full-time employees: _____

Do you have controlling interest in the business? ☐ Yes ☐ No

Does your business involve real estate ownership? ☐ Yes ☐ No

If the business value is less than the unpaid business debt, please explain or if business has been sold, provide verification of sale and gain or loss:

Section E - Partnerships:

Schedule E of the 2011 federal tax transcript submitted to our office indicates an interest in a partnership. Please provide the following information from the 2011 Form 1065 U.S. Partnership Return, including information on Schedules K and L for each Partnership/Sub Chapter S Corporation listed on Schedule E of your parents' 2011 federal tax return. If more than one partnership is listed on the income tax form, list additional partnership(s) on a separate page indicating all requested information.

Partnership name: _____
Partnership market value (100%): \$ _____
Partnership debt (100%): \$ _____
Percentage of your share: _____ %
Number of full-time employees: _____
Do you have controlling interest in the partnership? ☐ Yes ☐ No
Does your partnership involve real estate ownership? ☐ Yes ☐ No

If the partnership debt is greater than the values, please explain:

Section F - S Corporations:

Schedule E of the 2011 federal tax transcript submitted to our office indicates an interest in a Subchapter S Corporation. Please provide the following information from the 2011 Form 1120S US Income Tax Return for an S Corporation, including information from Schedules A to M and all K-1 schedules for each S Corporation listed on Schedule E of your parents' 2011 federal tax return.

List additional corporation(s) on a separate page indicating all requested information.

S Corporation Name: _____
S Corporation Market Value (100%): \$ _____
S Corporation Debt (100%): \$ _____
Percentage of parent(s) share: _____ %
Number of full-time employees: _____
Do you have controlling interest in the corporation? ☐ Yes ☐ No
Does your S Corporation involve real estate ownership? ☐ Yes ☐ No

If the partnership debt is greater than the values, please explain:

CERTIFICATION

All the information provided by me or any other person on this form is true and complete to the best of my knowledge. I understand that all those who sign are filing this form jointly. If asked by an authorized official, I agree to provide proof of the information that I have indicated on this form. I also realize that if I do not provide proof when asked, I may be denied aid.

Parent's Signature _____ Date _____

Parent's Name Printed _____

Student's Signature _____ Date _____

Student's Name Printed _____ Student ID# _____

Parent Daytime Phone (_____) _____ E-mail Address _____