Statement of Investment Value

Complete this form regarding information for the ______ Parent ______ Student

Student’s Name: ___________________________ Student I.D # ________________

Investment type: ____________________________

Investment Includes: Trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options bonds, other securities, Coverdell savings accounts, 529 college savings plans, the refund value of 529 state prepaid tuition plans, installment and land sale contracts (including mortgages held), commodities, etc.

Current Investment Value: ____________________________

Investment value means the current balance or market value of these investments as of today.

I/we certify that the above information about my/our investments is complete and correct.

Student’s Signature: ____________________________ Date: ____________

Spouse’s Signature: ____________________________ Date: ____________
(if applicable)

Father’s Signature: ____________________________ Date: ____________
(if applicable)

Mother’s Signature: ____________________________ Date: ____________
(if applicable)