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2018-2019 Verification of Assets

The Asset information reported on the 2018-2019 Free Application for Federal Student Aid (FAFSA) requires clarification or the Asset questions were not answered and the information is now needed. **The following information is required before we can process your request for Financial Aid.**

Please answer all questions (do not leave blank) AS OF THE DATE the FAFSA was completed.

As of the date you filed the FAFSA, what was the total current balance of Cash, Savings and Checking accounts? (Do not include student financial aid).

Student/Spouse \$ _____

Parent \$ _____
(If Dependent student)

As of the date you filed the FAFSA, what was the net worth of Investments, including real estate? Don't include the home you in which you live if you are independent or if dependent, the home in which your parents live. Please see the back of this form for further information.

Student/Spouse \$ _____

Parent \$ _____
(If Dependent student)

As of the date you filed the FAFSA, what was the net worth of current businesses and/or investment farms? Don't include a family farm or family business with 100 or fewer full-time or full-time equivalent employees. Please see the back of this form for further information.

Student/Spouse \$ _____

Parent \$ _____
(If Dependent student)

By signing I/we certify that all of the information I/we provided is true and complete to the best of my/our knowledge and I/we agree, if asked, to provide information that will verify the accuracy of this completed form.

STUDENT NAME: _____ **ID:** _____
(Printed)

STUDENT SIGNATURE: _____ **DATE:** _____

PARENT SIGNATURE: _____ **DATE:** _____
(If Dependent Student)

Net worth means the current value, as of the date the FAFSA was completed, of investments, businesses, and/or investment farms, minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use 0 for investments or properties with a negative value.

Investments include real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc.

Investments also include qualified educational benefits or education savings accounts (e.g., Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans). For a student who does not report parental information, the accounts owned by the student (and/or the student's spouse) are reported as student investments in question 42. For a student who must report parental information, the accounts are reported as parental investments in question 91, including all accounts owned by the student and all accounts owned by the parents for any member of the household.

Money received, or paid on your behalf, also includes distributions to you (the student beneficiary) from a 529 plan that is owned by someone other than you or your parents (such as your grandparents, aunts, uncles, and non-custodial parents). You must include these distribution amounts in questions 45j (money received or paid on your (student) behalf).

Investments do not include the home you live in, the value of life insurance, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings and checking accounts already reported in questions 41 and 90.

Investments also do not include UGMA and UTMA accounts for which you are the custodian, but not the owner.

Investment value means the current balance or market value of these investments as of the date you completed the FAFSA. Investment debt means only those debts that are related to the investments.

Business and/or investment farm value includes the market value of land, buildings, machinery, equipment, inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral.

Business value does not include the value of a small business if your family owns and controls more than 50 percent of the business and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, your family includes (1) persons directly related to you, such as a parent, sister or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law.

Investment farm value does not include the value of a family farm that you (your spouse and/or your parents) live on and operate.