



FINANCIAL AID OFFICE
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 TEL: 563-355-3500
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 TEL: 515-727-2100

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2018–2019 Statement of Net Value for Businesses and/or Investments

This document may be requested by our Financial Aid department for verification purposes. There are three sections to this document however, not all sections may be required for you to complete.

If you are completing either the Investments or Business Owners section then you must only complete and sign either option 1 or 2. Each section has its own instructions so please read each section carefully. If you are need assistance then please reach out to the Financial Aid Department.

Students or designees completing this form on behalf of a student attending Kaplan University online must provide their original signature using blue or black ink.

STUDENT NAME: _____ **LAST FOUR DIGITS OF SSN:** _____

I am the Student I am the Spouse I am the Parent

Statements for Investments:

Complete this section only if you have an amount reported on form 1040 lines 9a, 9b, 13, 14 and 17 or form 1040A lines 9a and 9b.

1. My reported investments do not have a positive net value. My investment debts are more than or at least equal to the total value or I no longer own the investments.

Signature: _____ **Date:** _____

2. My reported investments have a net value of \$ _____ .00 (Only if positive number).

Signature: _____ **Date:** _____

Statement of Cash, Saving, and Checking:

Complete this section only if you have an amount reported on line 8a of the 1040 or 1040A form.

As of the date you signed your 2018-2019 Free Application for Federal Student Aid, what was the total current balance of your (and your spouse's) cash, savings, and checking accounts? (Do not include student's financial aid.)

Amount: \$ _____

Signature: _____ **Date:** _____

Statement for Business Owners/Self-Employed:

Complete this section only if your form 1040 has an amount listed on lines 12 and/or 18. (Net Value = Total Business Value – Total Business Debt) Enter zero if your business has less than 100 employees.

1. My reported business does not have a positive net value. My business debts are more than or at least equal to the total value or I no longer own the business.

Signature: _____ **Date:** _____

2. My reported business has a net value of \$ _____ .00 (Only if positive number).

Signature: _____ **Date:** _____