

STUDENT NAME

UMASS GLOBAL ID NUMBER

After evaluating the information on your FAFSA and 2020 federal tax transcript(s), additional information is needed in order to complete your application.

DO NOT LEAVE ANY LINE BLANK. USE ZEROS IF NO VALUE or N/A IF NOT APPLICABLE

ASSET VALUE (AS OF FAFSA FILING DATE):

	STUDENT & SPOUSE	PARENT - IF YOU ARE A DEPENDENT STUDENT
CASH, SAVINGS AND CHECKING	\$	\$

INVESTMENT VALUE

	STUDENT & SPOUSE	PARENT - IF YOU ARE A DEPENDENT STUDENT
REAL ESTATE (DO NOT INCLUDE THE HOME YOU LIVE IN)	\$	\$
CDs, STOCKS, TRUST FUNDS, BONDS, UGMA AND UTMA ACCOUNTS, SECURITIES, MUTUAL FUNDS, COMMODITIES	\$	\$
529 COLLEGE SAVINGS PLANS, COVERDELL SAVINGS ACCOUNTS, INSTALLMENT AND LAND SALE CONTRACTS	\$	\$
OTHER INVESTMENTS (DO NOT INCLUDE LIFE INSURANCE, PENSIONS, ANNUITIES, NON-EDUCATION IRA, KEOGH PLAN, 401K, 403B)	\$	\$
INVESTMENT VALUE TOTAL	\$	\$

BUSINESS VALUE (AS OF FAFSA FILING DATE):

	STUDENT & SPOUSE	PARENT - IF YOU ARE A DEPENDENT STUDENT
DO YOU OR YOUR FAMILY OWN OR CONTROL MORE THAN 50% OF A BUSINESS?	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE BUSINESS HAVE MORE THAN 100 FULL TIME EMPLOYEES?	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
IF YES TO BOTH QUESTIONS ANSWER THE FOLLOWING QUESTIONS: WHAT IS THE BUSINESS VALUE?	\$	\$
WHAT IS THE BUSINESS DEBT?	\$	\$
BUSINESS NET WORTH (VALUE MINUS DEBT)	\$	\$

All of the information on this form is true and complete to the best of my knowledge. I understand that purposely giving false or misleading information on this form may result in reduced eligibility and/or repayment of aid.

STUDENT SIGNATURE

DATE

PARENT SIGNATURE IF DEPENDENT

DATE

Submit Completed Form via the Student Portal
OR Fax: 866-659-1147 Mail: UMass Global, Financial Aid Office, Third Floor 16355 Laguna Canyon Rd, Irvine, CA 92618