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UCSC Student's ID /Account Number (Do not use CRUZ ID)

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UCSC Student's Last Name

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First Name

FOR THIS SECTION PLEASE REPORT INFORMATION AS OF THE DATE YOU FIRST FILED THE 2017-18 FINANCIAL AID APPLICATION.

Cash, Savings and Checking Accounts	PARENT	STUDENT
	\$ _____	\$ _____

Net Worth of Your Investments
Note: Investments **do not include the home you live in, the value of life insurance, retirement plans (pension funds, annuities, non-education IRA's, Keogh plans, etc.)**
Net worth of your investments, other than investment real estate reported below. Investments include trust funds, UGMA/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 total refund value of all 529 prepaid tuition plans.

PARENT	STUDENT
\$ _____	\$ _____

PARENT(S) REAL ESTATE INVESTMENTS (not included in net worth listed above)

Complete this information for all real estate you (and your spouse) own such as mobile homes, condos, duplexes, rental property, land, summer homes, etc., as of the date the 2017-18 financial aid application was filed. Do not include the home you live in.

Do you the parent(s) own real estate investments excluding the home you live in? Yes No If yes, provide details below.

Property 1 (Do not report the home you live in):

Current Market Value* \$ _____ Mortgage Balance \$ _____ Purchase Price \$ _____ Year Acquired _____
Property Address _____
Street address City State Zip Code

Property 2 (Do not report the home you live in):

Current Market Value* \$ _____ Mortgage Balance \$ _____ Purchase Price \$ _____ Year Acquired _____
Property Address _____
Street address City State Zip Code

Property 3 (Do not report the home you live in):

Current Market Value* \$ _____ Mortgage Balance \$ _____ Purchase Price \$ _____ Year Acquired _____
Property Address _____
Street address City State Zip Code

Complete this section if you, the parent, **RENTED OUT A PORTION OF THE HOME YOU LIVE IN** that meets the following criteria: the rental unit has its own entry and includes a kitchen and bath. The portion of your home that generates rental income is considered an asset and must be reported as an investment net worth on the financial aid application. Complete the following information about the home you live in:

Current Market Value* \$ _____ Mortgage Balance \$ _____ Purchase Price \$ _____ Year Acquired _____
Rental Square Footage _____ + Home Square Footage _____ = Total Dwelling Square Footage _____

*on the date you filed the financial aid application

STUDENT REAL ESTATE INVESTMENTS

Does the student own any real estate investment property yes no

For Office Use Only
Real Estate Net Worth = Total of Net Value of Each Property listed above _____
Total Investments _____ + Real Estate Net Worth _____ = Total Investment Net Worth _____

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UCSC Student's ID /Account Number (Do not use CRUZ ID)

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UCSC Student's Last Name

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First Name

DO NOT LEAVE BLANKS.

FOR THE FOLLOWING OTHER INCOME INFORMATION, PLEASE REPORT 2015 CALENDAR YEAR INFORMATION

PARENT

STUDENT

1. Child support **received** by you (and your spouse) for any of your children. Do not include foster care or adoption payments.

\$ _____ /yr.

\$ N/A /yr.

Name of person who paid child support	Name of person to whom child support was paid	Name of child for whom support was paid	Amount of child support paid in 2015

2. Housing, food, and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits—for example, Resident Assistant (RA) housing benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.

\$ _____ /yr.

\$ _____ /yr.

3. Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.

\$ _____ /yr.

\$ _____ /yr.

4. Other untaxed income not reported, such as workers' compensation, disability benefits, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040—line 25. Don't include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security Benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

List source: _____

\$ _____ /yr.

\$ _____ /yr.

5. Money received as gifts or to make payments on your behalf (e.g. bills) not reported elsewhere on this form. Do not include financial aid. Include money received from a parent or other person whose financial information is not reported on this form and is not part of a legal child support agreement.

Please state source: _____

\$ N/A /yr.

\$ _____ /yr.

6. Child support **paid** by you because of divorce or separation or as a result of a legal requirement. Do not include support for children in your household.

\$ _____ /yr.

\$ N/A /yr.

Name of person who paid child support	Name of person to whom child support was paid	Name of child for whom support was paid	Amount of child support paid in 2015

7. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.

\$ _____ /yr.

\$ _____ /yr.

8. Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay.

\$ _____ /yr.

\$ _____ /yr.

9. Earnings from work under a cooperative education program offered by a college.

\$ _____ /yr.

\$ _____ /yr.

