



**Financial Aid Office**  
 141 College Drive  
 Albemarle, NC 28001  
 Telephone: (704) 991-0302

**VERIFICATION OF  
 INVESTMENTS**

*(Please review this form, answer all questions, sign, and return to the SCC Financial Aid Office)*

You have been selected by the Department of Education for a process called “verification”. The SCC Financial Aid Office requests all **net worth** of your investments, if any, so that your financial aid record will be updated reflecting the required information.

**Net Worth** means current market value minus debt. If net worth is one million dollars or more, enter \$999,999. If net worth is negative, enter 0.

**Investments include** real estate (do not include the home you live in), trust funds, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, college savings plans, installment and land sale contracts (including mortgages held), commodities, etc. For more information about reporting education savings plans, call 1-800-433-3243. Investment value includes the 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.

**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), and prepaid tuition plans, or cash, savings, and checking accounts already reported.

**Student and/or Spouse:**

As of the date you completed the FAFSA, what is the net worth of your (and spouse’s) investments? \$ \_\_\_\_\_

**Parent (if applicable):**

As of the date you completed the FAFSA, what is the net worth of your parents’ investments? \$ \_\_\_\_\_

**Acknowledgement:** I certify that the above information is true and factual to the best of my knowledge.

\_\_\_\_\_ (Student signature) \_\_\_\_\_ (Date)

\_\_\_\_\_ (Parent signature) \_\_\_\_\_ (Date)