



**St. John's University**  
**Office of Student Financial Services**  
 Statement of Real Estate Value/Debt or Investment Value/Debt 2023-2024

Student Name: \_\_\_\_\_ ID Number X \_\_\_\_\_

Submit form by securely uploading to: [www.stjohns.edu/SFSdocumentupload](http://www.stjohns.edu/SFSdocumentupload)

*The questions on this form are to be completed as they pertain to: Parent's real estate/investment value(s) AND/OR Student's (and Spouse's) real estate/investment value(s). Please report values and debt as of the date of the FAFSA filing.*

**SECTION A: REAL ESTATE VALUE AND DEBT**

Real estate includes rental property, land, second homes or summer homes and portions of multi-family dwellings. (Note: If you rent a portion of the home you live in, you must report the net worth of the portion of the property which is rented.) Complete the property questions for each property owned.

**Please attach Schedule E of federal tax return transcript for parents and/or student.**

**\*\*\*\*PLEASE SEND COPY AS ORIGINAL WILL NOT BE RETURNED\*\*\*\***

Property Address (Please include street, city and state for each property owned)	Type of Property (Please check appropriate box)	Present Market Value of Property (A)	Current Debt on Property (Mortgage Balance) (B)	Net Value of Property (A) - (B)	Percentage of Property Owned	Percentage of Property Not Occupied by Owner
	<input type="checkbox"/> House <input type="checkbox"/> Condominium/Coop <input type="checkbox"/> Other _____	\$ _____	\$ _____	\$ _____	<input type="checkbox"/> 100% <input type="checkbox"/> 50% <input type="checkbox"/> Other _____	<input type="checkbox"/> 100% <input type="checkbox"/> 50% <input type="checkbox"/> Other _____
	<input type="checkbox"/> House <input type="checkbox"/> Condominium/Coop <input type="checkbox"/> Other _____	\$ _____	\$ _____	\$ _____	<input type="checkbox"/> 100% <input type="checkbox"/> 50% <input type="checkbox"/> Other _____	<input type="checkbox"/> 100% <input type="checkbox"/> 50% <input type="checkbox"/> Other _____
	<input type="checkbox"/> House <input type="checkbox"/> Condominium/Coop <input type="checkbox"/> Other _____	\$ _____	\$ _____	\$ _____	<input type="checkbox"/> 100% <input type="checkbox"/> 50% <input type="checkbox"/> Other _____	<input type="checkbox"/> 100% <input type="checkbox"/> 50% <input type="checkbox"/> Other _____

**SECTION B: VALUE AND DEBT OF INVESTMENTS**

List below, the type, value and debt of each investment type owned by you (and your spouse) or by your parents. Be sure to include trust funds, money market funds, mutual funds, certificates of deposit, stocks, bonds and other securities, installment and land sale contracts (including mortgages held), commodities, precious and strategic metals, "S" or "P" (Partnership Corporations, etc.) Do not include the value of life insurance and retirement plans (pension funds, annuities, IRAs, Keogh plans, etc.) or the value of prepaid tuition plans. Investment debt means only those debts related to investments.

**Please attach Schedule 1 and D, E, or B of 2021 tax return or federal tax return transcript for parents and/or student.**

TYPE OF INVESTMENT	OWNER OF INVESTMENT	PRESENT VALUE OF INVESTMENT [A]	PRESENT DEBT BALANCE ON INVESTMENT [B]	NET VALUE OF INVESTMENT [A-B]
		\$ _____	\$ _____	\$ _____
		\$ _____	\$ _____	\$ _____
		\$ _____	\$ _____	\$ _____

**This form must be signed by the student, the student's spouse (if applicable), and the parents if the student is dependent.**

**CERTIFICATION:** I (we) hereby attest that all the information on this form is accurate to the best of my (our) knowledge. I (we) understand that providing false or misleading information can jeopardize financial aid eligibility and subject me (us) to federal penalties.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent 1 Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent 2 Signature

\_\_\_\_\_  
Date