



2020-2021 Student Interest/Dividend Worksheet

OFFICE OF STUDENT FINANCIAL PLANNING

Student Name _____

Student ID # _____

Date _____

We must have the following information to complete the processing of your 2020-2021 Financial Aid application. As part of your FAFSA review, we have noted a possible inconsistency in the information that has been reported for your assets on the FAFSA and the amount of interest, dividend, and/or capital gain income reported on your 2018 Federal tax return. **PLEASE NOTE: Financial Aid is awarded on a first come first serve basis; therefore, it is very important to send us the necessary information immediately. We cannot complete your application until this information is returned.** If you have any questions concerning this form or the financial aid process, please call our office at 515-271-2905 or toll-free at 1-800-44-DRAKE. Thank you for your cooperation!

We currently have the following information on file:

Student's Assets (from FAFSA)	Student's Income from Assets (from 2018 Federal tax return)
Cash/Savings/Checking	Interest
Net Investments	Dividends
	Capital Gains

In order to complete the processing of your financial aid application, we need to verify the net worth of your assets at the time you filed the FAFSA. To do so, please complete the following worksheet.

Name/Source & Type of Investment or Account	Interest / Dividend / Capital Gain Income Earned 2018	Net Worth As of _____
<i>Example: Home Town Bank - Savings</i>	\$53	\$503.25
	\$	\$
	\$	\$
	\$	\$
	\$	\$
TOTALS	\$	\$

We realize the level of interest, dividend, and capital gain income reported on your 2018 Federal tax return may have been generated from savings and investments that were no longer owned when you filed your FAFSA. If this is the case, please explain this apparent decrease in asset value on the back of this form.

If checked, please also provide a copy of Schedule 1 of your 2018 Federal tax return.

Signature

Student Signature _____

Date _____

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Submit this worksheet to: finaiddocs@drake.edu or mail/fax to:
Office of Student Financial Planning • Drake University • 2507 University Ave • Des Moines, IA 50311
Toll Free: 1-800-443-7253 (Option 3) • Phone: 515-271-2905 • FAX: 515-271-4042 •

Please be sure to update your **mailing** address and phone number if they have changed. To do this, log into My Drake Home and on the home tab choose the MyDUSIS link and then personal information. If you would prefer to do by phone, call Registrar at [515-271-2025](tel:515-271-2025).