

Business and Investment Values Worksheet Instructions

Please read the following instructions completely before filling out the worksheet.

- You will need copies of the federal tax returns for both the student and the spouse to accurately complete the Business and Investment Values Worksheet.
- For student and spouse who did not file a federal tax return, the worksheet does not need to be submitted.
- If the student and/or spouse filed a 1040, please report the values from the requested lines (8a, 12, and 17). The amounts listed on the worksheet must match the tax returns.
- If a 1040A/1040EZ was filed by the student and the spouse, then you should report the taxable interest from line 8a (1040A) or line 2 (1040EZ) and the balance of the corresponding accounts. You should not have any business or investments to report from lines 12 or 17.
- If neither the student nor the spouse has any amounts on the requested lines (8a, 12, and 17), then you do not need to submit this worksheet.
- If the student and spouse filed jointly, record the values on the “student” side of the worksheet.
- This worksheet must be signed by the student.
- Please submit to the VFAO:
 - signed copies of the federal tax returns for both the student and the spouse
 - the Business and Investment Values Worksheet (the 2nd page of this document)
 - any other requested paperwork

