

****Important note to business owners:** If you are expecting a loss of income for 2021 please note that due to the unpredictable nature of business income, you will be required to submit a copy of your 2021 tax return. Failure to submit the 2021 tax return by May 1, 2022 will result in cancelation of all federal aid.

Section D: Complete this section if you had excessive Medical Expenses

Note: Out of pocket expenses must exceed 11% of your adjusted gross income (AGI) as per the IRS threshold guidelines

Submit the following:

- Copies of insurance statements/receipts to show out of pocket costs (Must be itemized and totaled)

Section E: Asset Information: All are required to complete this section - Do not leave any blank spaces; if the answer is zero place a \$0 on the line. ** Include the market value of land, buildings, machinery, equipment, inventory, etc... minus the debt the business or investment farm was used as collateral. Do not include the value of a small business that you (and/or your parents) own and control and has less than 100 full time or full time equivalent employees. Also, do not include a family farm that you (and/or your parents) live on and operate.

	Student	Parent(s)
1. As of the date you signed your 2021-2022 FAFSA, what was the total current balance in cash and of all savings and checking accounts?	\$ _____	\$ _____
2. As of the date you signed your 2021-2022 FAFSA, what was the net worth of investments? (Do not include real estate). Net worth means current value minus debt.	\$ _____	\$ _____
Examples of investments to be included:		
<ul style="list-style-type: none"> • Stock options • UGMA & UTMA accounts • Mutual Funds • Coverdell savings accounts • Commodities, etc. 	<ul style="list-style-type: none"> • Trust Funds • Money Market Funds • Certificate of Deposit • 529 College Savings Plans • Bonds 	<ul style="list-style-type: none"> • Refund value of 529 prepaid tuition plans • Other securities • Installments and land sale contracts (including mortgages held)
3. Real Estate Investments (You MUST ANSWER BOTH 3a & 3b):		
a. Is the home that your family owns and resides in a multifamily dwelling? (e.g., a portion of your home contains a rental unit)	<input type="checkbox"/> YES	<input type="checkbox"/> NO
ONLY If you answered YES to part 3a, please answer the following questions:		
What is the current market value of the property if sold today? \$ _____	What is the mortgage balance owed on the property? \$ _____	Number of family units in the property? _____
b. Do you or your parent(s) own real estate other than your primary residence (may be listed on schedule E of 1040 tax form)?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
ONLY If you answered YES to part 3b, please answer the following questions:		
What is the total current market value of all properties if sold today? \$ _____	What is the total mortgage balances owed on all properties? \$ _____	
4. Do you or your parents own a business that has GREATER than 100 employees?	Student	Parent(s)
	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
5. If you answered YES to number 4, please answer the following questions:		
What type of business do you own? _____	How many full time employees do you have? _____	

As of the date you signed your FAFSA, what was the net worth of your current businesses and/or investment farms**?

\$ _____ \$ _____

Section F: Certification

We have completed all sections of this form and the information contained herein is true and complete to the best of our knowledge. **We also understand that if our financial situation changes during the academic year we must notify the appropriate Financial Aid Office immediately.**

Student Signature/Date

Parent Signature/Date

PLEASE NOTE: Your request for a re-evaluation will be held until ALL the required information AND documentation is received. Please return this completed form along with the required documentation to the appropriate financial aid department. Standard processing time for re-evaluations is 7-10 business days from the date in our office receives final requested documents

WARNING: If you purposely provide false or misleading information, you may be fined up to \$20,000, sent to prison or both.

Financial Aid Mailing and Contact Information

You must print and sign this form as electronic signatures are not acceptable.

For secure and faster processing, submit this form via the [Upload Process](#) located in your SOLAR To Do List.

Need help scanning your document? Check out our [Scanning Documents Using Your Smartphone guide](#).

Note: Only .tif and/or .pdf file types are allowed for uploading.

Alternatively, mail or fax all documents to the financial aid office listed below.

Be sure to include the student's name and **Stony Brook ID** on all correspondence.

Office of Financial Aid and Scholarship Services
Stony Brook Union, Suite 208
Stony Brook, NY 11794-3252
Telephone: 631-632-6840
Fax: 631-632-9525