

# 2009-2010 Verification Worksheet

## Federal Student Aid Programs

Your application was selected by the U.S. Dept. of Education for review in a process called “verification.” In this process, we are required by federal law (34 CFR, Part 668) to compare the information from your application with the information provided on this form and with signed copies of your 2008 federal tax forms (and your spouse’s if you are married, or parents’ if you are considered dependent for federal aid purposes). If there are differences between your application and the documents you’ve submitted, corrections may need to be made. **We cannot process your financial aid until verification has been completed, so please provide the required documents as soon as possible.**

**What you should do:**

1. Collect your (and your spouse’s or parents’) financial documents (signed Federal income tax forms, etc.).
2. **Complete all sections and sign the worksheet** – you (and your parent if you are required to provide their income information).
3. Contact us if you have questions about completing this worksheet.
4. Bring, mail, or fax the completed worksheet, tax forms, and any other documents to our office.
5. We will review the information on these documents and make corrections if necessary.

### A. Student Information

<i>Last Name</i>	<i>First Name</i>	<i>M.I.</i>	<i>Social Security Number</i>	
<i>Address (include apt. #)</i>		<i>City</i>	<i>State</i>	<i>Zip Code</i>
<i>Date of Birth</i>	<i>E-mail Address</i>		<i>Phone Number (include area code)</i>	

### B. Family Information

- Independent Students:** List the people in your household, include: (a) yourself, and your spouse if you have one; and (b) your children, if you will provide more than half of their support from July 1, 2009 through June 30, 2010; and (c) other people if they now live with you, and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2009 through June 30, 2010.
- Dependent Students:** List the people in your parents’ household, include: (a) yourself and your parent(s) (including stepparent) even if you don’t live with your parents; and (b) your parents’ other children, even if they don’t live with your parent(s), if (1) your parents provide more than half of their support from July 1, 2009 through June 30, 2010, or (2) the children would be required to provide parental information when applying for Federal student aid; and (c) other people if they now live with your parents, and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2009 through June 30, 2010.

**Write the names of all household members.** Also write in the name of the college for any family member, excluding your parent(s), who will be attending college at least half-time between July 1, 2009 and June 30, 2010, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
<i>Example: Martha Jones</i>	<i>24</i>	<i>Wife</i>	<i>City University</i>
		Self	

## C. Tax Forms and Income Information

- All tax filers must submit a **signed** copy of all 2008 Federal Income Tax returns which include the 2008 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return for those people checked below:

You                       Your spouse                       Your father (step)                       Your mother (step)

*If you did not keep a copy, call the IRS at 1-800-829-1040. Press "2- Refund or Personal Tax Account" then Press "2 – Personal Tax Account", follow the instructions until given the option to select a " tax return transcript", and then follow the instructions.*

- Check the box for those people who did not and are not required to file a 2008 Federal Income Tax Return. List below your employer(s) and any income received in 2008 (use W-2 forms or other earning statements).

You                       Your spouse                       Your father (step)                       Your mother (step)

Name of Employer	Student Amount	Spouse or Parent(s) Amount

- Both tax filers and non-tax filers must list any untaxed income received in 2008. **Be sure to enter zeros if no funds were received.** (Students see question 47 and/or parents see question 95 of the Free Application for Federal Student Aid (FAFSA)). Failure to complete this section will delay the processing of your financial aid.

Student (spouse)	Calendar Year 2008	Parent(s) (step-parent)
	<b>FAFSA Questions 47 and/or 95</b>	
\$	Payments to tax-deferred pensions and savings plans (paid directly or withheld from earnings) including, but not limited to, amounts reported on W-2 Form Box 12a - 12d, codes D, E, F, G, H, and S.	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040 – line 28 + line 32 or 1040A – line 17.	\$
\$	Child support received for all children. Don't include foster care or adoption payments.	\$
\$	Tax exempt interest income from IRS Form 1040 – line 8b or 1040A– line 8b.	\$
\$	Untaxed portions of IRA distributions from IRS Form 1040– lines (15a minus 15b) or 1040A– lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	\$
\$	Untaxed portions of pensions from IRS Form 1040– lines (16a minus 16b) or 1040A – lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	\$
\$	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits).	\$
\$	Other untaxed income not reported, such as worker's compensation, disability, etc. <b>Don't include</b> student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$

## D. Sign This Worksheet

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. If dependent, at least one parent must sign. **Warning:** If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

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

\_\_\_\_\_  
Parent's Signature (Dependent Students Only)                      Date \_\_\_\_\_