2009-2010 Verification Worksheet

Federal Student Aid Programs

Independent

What you should do

Your application was selected for review in a process called Verification. In this process, we will be comparing information from your application with signed copies of your (and your spouse's, if you are married) 2008 Federal tax forms, or with W-2 forms or other financial documents. The law says we have the right to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, we may need to make corrections electronically on your Student Aid Report (SAR). **We cannot process your financial aid until verification has been completed, so please provide the required documents as soon as possible.**

1. Collect your (and your spouse's) financial documents (**signed** 2008 Federal income tax forms, W-2 forms, LES's, etc.).
2. Contact us if you have questions about completing this worksheet.
3. Fill in and sign the worksheet-your spouse is not required to sign.
4. Submit the completed worksheet, tax forms, and any other documents requested by our office.
5. We will compare information on the documents and make corrections if necessary.

Your school must review the requested information under the financial aid program rules (34 CFR, Part 668).

A. STUDENT INFORMATION

Last name First name M.I. Social Security Number

Address (include apt. no.) Date of birth

City State ZIP code Phone number (include area code)

B. FAMILY INFORMATION

List the people in **your household**; include:

- yourself, and your spouse if you have one, and
- your children, if you will provide more than half of their support from July 1, 2009, through June 30, 2010, and
- 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.

Write the names of **all** household members in the space below. Also, write in the name of the college for any household 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
Missy Jones (example)	**24**	**Wife**	**Central University**
		Self	Wallace Community College

C. TAX FORMS AND INCOME INFORMATION

Check **one** box only for student and **one** box only for spouse (if married). Tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of the tax return, request a copy from your tax preparer or a copy of an Internal Revenue Service form that lists tax account information.

STUDENT

☐ Check and attach **signed** tax return.

☐ Check here if you **will not** and **are not required** to file a 2008 U.S. Tax Return. Complete Non-Filer section on reverse.

SPOUSE

☐ Check and attached spouse's **signed** tax return if your spouse filed a separate return.

☐ Check if your spouse **will not** and **is not required** to file a 2008 U.S. Tax Return. Complete Non-Filer section on reverse.

Calendar Year 2008 STUDENT	2009-2010 INDEPENDENT ANSWER EACH QUESTION 2008 ADDITIONAL FINANCIAL INFORMATION – REPORT ANNUAL AMOUNTS	SPOUSE
$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 or 1040A-line 31	$
$	Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children you claimed in your household, as reported in FAFSA question 96 or 75.	$
$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	$
$	Grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	$
$	Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	$
STUDENT	**2008 Untaxed Income**	**SPOUSE**
$	Payments to tax-deferred pension and savings plan (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 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 fees.	$
$	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 (11a minus 11b). 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).	$
$	Veterans' non-education benefits such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	$
$	Other untaxed income or benefits not reported, such as workers' compensation, disability, etc. Don't include 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.	$
$	Money received, or paid on your behalf (e.g. bills) not reported elsewhere on form.	$

Non-filers: If you (or spouse) did not file and are not required to file a 2008 Federal income tax return, list below all employers and any income received in 2008 (use the W-2 form or other earnings statements if available).

Name of Employer/Source	2008 Student Amount	2008 Spouse Amount
	$	$
	$	$
	$	$

D. SIGN THIS WORKSHEET

By signing this worksheet, I (we) certify that all the information reported on it is complete and correct.
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** **Spouse's Signature (optional)** **Date**