



2009-10 Verification Worksheet

Federal Student Aid Programs

Independent

FORM APPROVED
OMB NO.1845-0041

Your application was selected for review in a process called "Verification." In this process, your school 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, you or your school may send corrections electronically or by using your Student Aid Report.

Complete this verification form and submit it to your financial aid administrator as soon as possible, so that your financial aid won't be delayed. Your financial aid administrator will help you.

What you should do

1. Collect your (and your spouse's) financial documents (signed Federal income tax forms, W-2 forms, etc).
2. Talk to your financial aid administrator if you have questions about completing this worksheet.
3. Complete and sign the worksheet.
4. Take the completed worksheet, tax forms and any other documents your school needs to your financial aid administrator.
5. Your financial aid administrator will compare information on this worksheet and any supporting documents with the information you submitted on your application. You or your school may need to make corrections electronically or by using your SAR.

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, including:

- 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. Also write the name of the college for any household member, who will be attending college at least half-time between July 1, 2009, and June 30, 2010, and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

| Full Name | Age | Relationship | College |
|------------------------|-----|--------------|-----------------|
| Martha Jones (example) | 24 | Wife | City University |
| | | Self | |
| | | | |
| | | | |
| | | | |
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C. Student's Tax Forms and Income Information (all applicants)

1. Check one box only. Tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ, TeleFile Tax Record, 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.

- Check and attach signed tax return.
- Check and complete: signed tax return will be submitted to the school by _____ (date).
- Check here if you will not file and are not required to file a 2008 U.S. Income Tax Return. Complete #2 below.

2. If you did not file and are not required to file a 2008 Federal income tax return, list below your employer(s) and any income received in 2008 (use the W-2 form or other earnings statements if available). If \$0 earned, so indicate.

| Sources | 2008 Amount |
|---------|-------------|
| | |
| | |
| | |

3. List below the amounts you received in 2008 for child support and other untaxed income.

- Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in 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 – total of lines 28 + 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 and pensions from IRS Form 1040 – lines (15a minus 15b) + (16a minus 16b) or 1040A – lines (11a minus 11b) + (12a minus 12b) excluding rollovers. If negative, enter a zero.
\$ _____
- Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value benefits).
\$ _____
- Veterans noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
\$ _____

Any other untaxed income or benefits not reported elsewhere in this section, such as workers' compensation, disability, etc. **Don't include** student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, 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 this form.

4. List below the amounts you received in 2008 as allowable exclusions to income.

\$ _____ Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 – line 50 or 1040A – line 31.
 Child support **paid** because of divorce, separation or as a result of legal requirement. **Do not** include support paid for children in your household, as reported in question #96 on the FAFSA. **If you enter an amount, please provide the full name of the child(ren) on whose behalf support was paid:**
 \$ _____
 \$ _____ **Taxable earnings from Federal Work-Study or other need-based work programs.**
 Student 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 your adjusted gross income. Do not enter untaxed combat pay reported on the W-2 in box 12, code Q.

D. Spouse's Tax Forms and Income Information (If student is married)

1. Check one box only. Tax returns include the 2008 IRS form 1040, 1040A, 1040EZ, Tele-File Tax Record, a tax return from Puerto Rico or a foreign income tax return. If your spouse did not keep a copy of the tax return, request a copy from the tax preparer or a copy of an Internal Revenue Service form that lists tax account information.

- Check if you and your spouse did or will fill a joint return.
- Check and attach **signed** tax return if your spouse filed a separate return.
- Check and complete: signed spouse's tax return will be submitted to the school by _____ (date).
- Check here if your spouse will not file and is not required to file a 2008 U.S. Income Tax Return. Complete #2 below.

2. If your spouse did not file and is not required to file a 2008 Federal income tax return, list below your spouse's employer(s) and any income they received in 2008 (use the W-2 from or other earning statements if available). **If \$0 earned, so indicate.**

| Sources | 2008 Amount |
|---------|-------------|
| | |
| | |
| | |

3. List below the amounts your spouse received in 2008 for child support and other untaxed income (complete if spouse's information is not included in Section C).

\$ _____ Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in 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 – total of lines 28 + 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 and pensions from IRS Form 1040 – lines (15a minus 15b) + (16a minus 16b) or 1040A – lines (11a minus 11b) + (12a minus 12b) excluding rollovers. If negative, enter zero.
 \$ _____ Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value benefits).
 \$ _____ Veterans noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
 \$ _____ Any other untaxed income or benefits not reported elsewhere in this section, such as workers' compensation. **Don't include** student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusions or credit for federal tax on special fuels.
 \$ _____
 \$ _____ Money **received**, or paid on your behalf (e.g., bills), not reported elsewhere on this form.

4. List below the amounts your spouse received in 2008 as allowable exclusions to income.

\$ _____ Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 – line 50 or 1040A – line 31.
 Child support **paid** because of divorce, separation or as a result of legal requirement. **Do not** include support paid for children in your household, as reported in question #96 on the FAFSA. **If you enter an amount, please provide the full name of the child(ren) on whose behalf support was paid:**
 \$ _____
 \$ _____ **Taxable earnings from Federal Work-Study or other need-based work programs.**
 Student 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 your adjusted gross income. Do not enter untaxed combat pay reported on the W-2 in box 12, code Q.

E. Sign this Worksheet

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. If married, spouse's signature is optional.

Student _____ Date _____
 Spouse _____ Date _____

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

Do not mail this worksheet to the Department of Education. Take it to your Financial Administrator at your school. Don't forget to sign your tax forms.