

## 2009-2010 Verification Worksheet – Independent

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 2008 Federal Tax Forms, W-2 forms, and/or other financial documents of yours and your spouse/s. The law says we have the right to ask you for this information before awarding aid. If there are differences between your application information and your financial documents, you or your school may need to make corrections electronically or by using your Student Aid Report (SAR).

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 spouses' financial documents (signed Federal income tax forms, W-2 forms, etc.).
2. Talk to your financial aid administrator if you have any questions about completing this worksheet.
3. Complete and sign the worksheet.
4. Submit the completed worksheet, tax forms, and any other documents requested 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.

\_\_\_\_\_  
 CSU ID Number

\_\_\_\_\_  
 Address (include apt. #)

\_\_\_\_\_  
 Date of Birth

\_\_\_\_\_  
 City                                      State                                      Zip

\_\_\_\_\_  
 Phone Number (include area code)

Student Email: \_\_\_\_\_

### B. Family Information

List the people in your household, including:

- Yourself, 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 July1, 2009 through June 30, 2010.

Write the names of all household members in the space(s) below. Also write in 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, diploma, or certification program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
Missy Jones (example)	18	Sister	Central University
		Self	

**C. Student's Tax Forms and Income Information (all applicants)**

**Independent**

Check one box only. Tax returns include the 2008 IRS Federal 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.

- Check here if you are attaching a signed copy of your tax return.
- Check here if you will not file and are not required to file a 2008 U.S. Income Tax Return.

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 the answer is zero or does not apply, enter 0.

Sources	2008 Income
	\$
	\$
	\$

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

Check one box only. Tax returns include the 2008 IRS Federal Form 1040, 1040A, 104EZ, 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 file a joint return..
- Check and attach a signed tax return if your spouse filed a separate return.
- Check if your spouse will not file and is not required to file a 2008 U.S. Income tax return. 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 received in 2008 (use the W-2 form or other earning statement if available).

If your spouse did not file and is not required to file a 2008 Federal Income Tax Return, list below their employer/s and any income received in 2008 (use the W-2 form or other earnings statements if available). If the answer is zero or does not apply, enter 0.

Sources	2008 Income
	\$
	\$
	\$

**E. Student and Spouse (s) must complete and sign page 3 of this form.**

If the answer is zero or does not apply, enter 0.

Student Information	2008 – Untaxed Income - FAFSA question 47	Spouse Information
\$	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 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 <b>RECEIVED</b> for all children. <b>DO NOT</b> 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 (11a minus 11b). <b>EXCLUDE</b> 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). <b>EXCLUDE</b> 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 not reported, such as workers' compensation, disability, etc. Do not include student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Workforce Investment Act educational benefits, combat pay (if you are not a tax filer), 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.	\$

Student Information	2008 Additional Financial Information - FAFSA question 46 a-e)	Spouse Information
\$	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. Do not include support for children in your household, as reported in question 96	\$
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
\$	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. Combat pay is reported on the W-2 Box 12, Code Q.	\$

### Sign this Worksheet

Each person signing this form certifies that all the information reported on it is complete and correct. The student and at least one parent must sign and date

\_\_\_\_\_  
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.**

Return this form to the address provided on the top of page 1 of this document. Please sign and date all forms, including the copies of your Federal tax return.

The valid OMB control number for this information collection is 1845-0041