



2008-2009 Verification Worksheet

Federal Student Aid Programs

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) 2007 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 need to make corrections.

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. Submit the completed worksheet, tax forms, and any other documents your school requests 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.

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, 2008 through June 30, 2009, even if they do not live with you; 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, 2008 through June 30, 2009.

Write the names of all household members in the space(s) below. Also write in the name of the college for any household member, excluding your parent(s), who will be attending at least half time between July 1, 2008 and June 30, 2009, 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
Martha Jones (example)	24	Wife	City University
		Self	

PLEASE COMPLETE ALL LINES. IF A LINE IS LEFT BLANK, IT COULD DELAY YOUR FINANCIAL AID AWARD. IF THE AMOUNT IS ZERO, INDICATE "0" ON EACH LINE.

INDEPENDENT

Tax returns include the 2007 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy, request a copy from your tax preparer or request an Internal Revenue Service form that includes tax account information at 1-800-829-1040.

Student's Income for 2007

Did you, the student, file a Federal Tax Return for 2007? Yes No **If yes, attach signed tax return.**

Spouse's Income for 2007

Did you, the spouse, file a Federal Tax Return for 2007? Yes No **If yes, attach signed tax return.**

If you did not file and are not required to file a 2007 Federal income tax return, list below your employer(s) and any income received in 2007 (use the W-2 form or other earnings statements if available).			
STUDENT		SPOUSE	
SOURCE	AMOUNT	SOURCE	AMOUNT
	\$ Per Year		\$ Per Year
	\$ Per Year		\$ Per Year

STUDENT/SPOUSE WORKSHEET A

\$ _____ year **Welfare** benefits, including Temporary Assistance for Needy Families (TANF). Don't include Food stamps or subsidized housing.
 \$ _____ year **Social Security** benefits received, for all household members that were not taxed (such as SSI).

WORKSHEET B

\$ _____ year **Disability** benefits received for all household members that were not taxed.
 \$ _____ year **Child support received** for all children. Don't include foster care or adoption payments.
 \$ _____ year 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
 \$ _____ year 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
 \$ _____ year Tax exempt interest income from IRS Form 1040 - line 8b or 1040A – line 8b
 \$ _____ year Foreign income exclusion from IRS Form 2555 – line 45 or 2555EZ – line 18
 \$ _____ year Untaxed portions of IRA distributions from IRS Form 1040 - lines (15a minus 15b) or 1040A – lines (11a minus 11b). Exclude rollovers. If negative, enter zero.
 \$ _____ year Untaxed portions of pensions from IRS Form 1040 - lines (16a minus 16b) or 1040A - lines (12a Minus 12b). Exclude rollovers. If negative, enter zero.
 \$ _____ year Credit for federal tax on special fuels from IRS Form 4136 – line 17 (non-farmers only)
 \$ _____ year Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)
 \$ _____ year Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances
 \$ _____ year Other untaxed income not reported elsewhere on Worksheets A and B, such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Tax filers only: report combat pay not included in adjusted gross income (Question 35 - student). Don't include student aid, Workforce Investment Act educational benefits, combat pay if you are not a tax filer, or benefits from flexible spending arrangements (e.g., cafeteria plans).
 \$ _____ year **Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.**

WORKSHEET C

\$ _____ year Education credits from IRS Form 1040 – line 49 or 1040A – line 31.
 \$ _____ year **Child support paid** because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household, as reported in question 90.
 \$ _____ year Taxable earnings from need-based employment programs, such as Federal Work- Study and need-based employment portions of fellowships and assistantships.
 \$ _____ year 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.

Sign this Worksheet: By signing this worksheet, I (we) certify that all the information reported is complete and correct. If married, spouse's signature is optional unless otherwise indicated. **WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail or both.

Student _____ Date _____ Spouse _____ Date _____