



2008-09 Verification Worksheet

Federal Student Aid Programs

Dependent

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 you and your parent(s)' 2007 Federal tax forms, or with W-2 forms or other financial documents. The law states 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 administration will help you.

What you should do

1. Collect your and your parent(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 – you and at least one parent.
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 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 parents' household, including:

- yourself (even if you don't live with your parents) and your parent(s) you live with (including stepparent), and
- your parents' other children, even if they don't live with your parent(s), if (a) your parents will provide more than half of their support from July 1, 2008, through June 30, 2009, or (b) the children would be required to provide parental information when applying for Federal Student Aid, and
- 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, 2008, through June 30, 2009.

Write the names of all household members. Also write 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, 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
<i>Missy Jones (example)</i>	<i>18</i>	<i>Sister</i>	<i>Central University</i>
		Self	

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

1. Check one box only. Tax returns include the 2007 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 2007 U.S. Income Tax Return. Complete #2 below.

2. 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). **If \$0 earned, so indicate.**

Sources	2007 Amount

3. List below the amounts you received in 2007 for child support and other untaxed income.

- \$ _____ Earned income credit from IRS Form 1040 – line 66a; 1040A – line 40a; 1040EZ – line 8a; or Telefile — line L.
- \$ _____ Additional child tax credit from IRS Form 1040 — line 68 or 1040A – line 41.
- \$ _____ Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps or subsidized housing.
- \$ _____ Social Security benefits received that were not taxed (such as SSI).
- \$ _____ 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.
- \$ _____ Foreign income exclusion from IRS Form 2555 – line 45 or 2555EZ – line 18.
- \$ _____ 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.
- \$ _____ Credit for federal tax on special fuels from IRS Form 4136 – line 17 – nonfarmers only.
- \$ _____ 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, untaxed portions of railroad retirement benefits, Black Lung Benefits, Refugee Assistance, disability, etc. Tax filers only: report combat pay not included in AGI (FAFSA question # 35). **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).
- \$ _____ Money **received**, or paid on your behalf (e.g., bills), not reported elsewhere on this form.

4. List below the amounts you received in 2007 as allowable exclusions to income.

- \$ _____ Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 – line 49 or 1040A – line 31.
- \$ _____ Child support **paid** because of divorce, separation or as a result of legal requirement. **Do not** include support for children in your or your parents' household, as reported in question #66 on the FAFSA or in section B of this form. **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.

D. Parent(s) Tax Forms and Income Information

1. Check one box only. Tax returns include the 2007 IRS form 1040, 1040A, 1040EZ, Tele-File Tax Record, a tax return from Puerto Rico or a foreign income tax return. If your parent did not keep a copy of this tax return, request a copy from the tax preparer or a copy of an Internal Revenue Service form that lists tax account information.

- Check and attach **signed** tax return(s).
- 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 2007 U.S. Income Tax Return and complete #2 below.

2. If your parent(s) did not file and are not required to file a 2007 Federal income tax return, list below your parent(s)' employer(s) and any income they received in 2007 (use the W-2 from or other earning statements if available).

Sources	2007 Amount

3. List below the amounts your parent(s) received in 2007 for child support and other untaxed income.

- \$ _____ Earned income credit from IRS Form 1040 – line 66a; 1040A – line 40a; 1040EZ – line 8a; or Telefile — line L.
- \$ _____ Additional child tax credit from IRS Form 1040 — line 68 or 1040A – line 41.
- \$ _____ Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps or subsidized housing.
- \$ _____ Social Security benefits received for **all household members** reported in question #66 on the FAFSA that were not taxed (such as SSI). Exclude amounts received in the student's name and reported 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.
- \$ _____ Foreign income exclusion from IRS Form 2555 – line 45 or 2555EZ – line 18.
- \$ _____ 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.
- \$ _____ Credit for federal tax on special fuels from IRS Form 4136 – line 17 – nonfarmers only.
- \$ _____ 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, untaxed portions of railroad retirement benefits, Black Lung Benefits, Refugee Assistance, disability, etc. Tax filers only: report combat pay not included in AGI (FAFSA question #79). **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).
- \$ _____ Money **received**, or paid on your behalf (e.g., bills), not reported elsewhere on this form.

4. List below the amounts your parent(s) received in 2007 as allowable exclusions to income.

- \$ _____ Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 – line 49 or 1040A – line 31.
- \$ _____ Child support **paid** because of divorce, separation or as a result of legal requirement. **Do not** include support for children in your parents' household, as reported in question #66 on the FAFSA or in section B of this form. **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 parents' adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.

E. Sign this Worksheet

By signing this worksheet, we certify that all the information reported on this worksheet is complete and correct. At least one parent must sign.

Student _____ Date _____
 Parent _____ 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.