



# 2008-2009 Verification Worksheet

## Federal Student Aid Programs

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 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 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, & 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 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, 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 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
Martha Jones (example)	24	Wife	City University
		Self	

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 1845-0041. The time required to complete this information collection is estimated to average twelve minutes, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: US Department of Education, Washington, DC 20202-5345.

**C. 2007 SIGNED TAX RETURNS** mark the appropriate box that defines your tax return status & submit documents

**Signed Tax Return Attached:**  Student  Spouse (if applicable)  
**Tax Return will NOT be filed:**  Student  Spouse (if applicable)  
 Submit W2 forms from all employer(s) Submit W2 forms from all employer(s)

**D. VERIFICATION OF WORKSHEET A (2007 YEARLY TOTAL)**

Student/Spouse	Parent
\$ Earned income credit from IRS Form 1040-line 66a; 1040A-line 40a; 1040EZ-line 8a	Your parent's information not required
\$ Additional child tax credit from IRS Form 1040-line 68 or 1040A-line 41	
\$ Welfare benefits, including Temporary Assistance for Needy Families (TANF). Do not include food stamps or subsidized housing.	
\$ Social Security benefits received, that were not taxed (such as SSI), for all household members as reported in question 90. Report benefits paid directly to student (or spouse).	
\$ <b>TOTAL</b>	

**E. VERIFICATION OF WORKSHEET B (2007 YEARLY TOTAL)**

Student/Spouse	Parent
\$ 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	Your parent's information not required
\$ 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. 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 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.	
\$ Credit for federal tax on special fuels from IRS Form 4136-line 18 (nonfarmers only)	
\$ 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 elsewhere on Worksheets A and B, such as worker's compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Tax filers only: report combat pay not included in AGI (FAFSA questions 35 and 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 <b>received</b> , or paid on your behalf (e.g., bills), not reported elsewhere on this form.	
\$ <b>TOTAL</b>	\$XXXX

**F. VERIFICATION OF WORKSHEET C (2007 YEARLY TOTAL)**

Student/Spouse	Parent
\$ Education credits (Hope & Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31.	Your parent's information not required
\$ Child support <b>paid</b> because of divorce or separation. Don't include support for children in your household, as reported in question 90 (or Section 4 of the web application).	
\$ 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 (& your spouse's) adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships. (Submit documentation.)	
\$ <b>TOTAL</b>	\$XXXX

**G. SIGN THIS WORKSHEET**

By signing this worksheet, I (we) certify that all information reported on it is complete and correct.

\_\_\_\_\_  
Student Date

\_\_\_\_\_  
Spouse (optional) Date

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