



# 2009 -2010 Verification Worksheet

## Federal Student Aid Programs

Your financial aid 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 parents(s)' 2008 Federal tax forms, or with W-2 forms and 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). Please note: Correction(s) after verification may change your financial aid awards.

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.

### A: Student Information

Last Name	First Name	M.I.	Social Security Number
Address			Date of birth
City	State	Zip Code	Phone Number (include area code)

### B: Family Information

List the people in your parents' household, include:

- Yourself and your parent(s) (including step-parent) even if you don't live with your parent(s).
- 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, 2009 through June 30, 2010, 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, 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, excluding your parent(s), who will be attending at least half time between July 1, 2009 and June 30, 2010, 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 only one box below. Tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of your tax return, request a copy from your tax preparer or request 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 a 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.

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 W-2 form or other earnings statements if available).

Sources	2008 Income
	\$
	\$
	\$

### D: Parent(s)' Tax Forms and Income Information

1. Check only one box below. Tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If your parent(s) did not keep a copy of their tax return, request a copy from their tax preparer or request an Internal Revenue Service form that lists tax account information.

- Check here if you are attaching a signed copy of your parents' tax return(s).
- Check here if a signed tax return(s) will be submitted to the school by \_\_\_\_\_(date).
- Check here if your parent(s) will not file and is not required to file a 2008 U.S. Income Tax Return.

2. If your parent(s) did not file and are not required to file a 2008 Federal income tax return, list below your parent(s)' employer(s) and any income they received in 2008 (use the W-2 form or other earnings statements if available).

Sources	2008 Income
	\$
	\$
	\$

**E: 2008 Additional Financial Information**

Report below any income received during the 2008 calendar year. Report the amount for the entire year. **Please do not leave any item BLANK. If not applicable, answer N/A.**

Student	2008 Additional Financial Information	Parent(s)
\$	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. <b>Do not include support for children in your (or your parents') household, as reported in question 96 (or 75 for your parents).</b>	\$
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and Assistantships.	\$
\$	Grant and scholarship aid reported to the IRS in the Adjusted Gross Income. <b>Includes Americorps benefits (awards, living allowances and interest accrual payments), as well as, grant and scholarship portions of fellowships and assistantships.</b>	\$
\$	Combat pay or special combat pay. <b>Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).</b>	\$

**F: 2008 Untaxed Income**

Report below any income received during the 2008 calendar year. Report the amount for the entire year. **Please do not leave any item BLANK. If not applicable, answer N/A.**

Student	2008 Untaxed Income	Parent(s)
\$	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 Forms in Boxes 12a through 12d, codes D, E, F, G, H and S.	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans from IRS Form 1040 – line 28 + line 32 or 1040A – Line 17.	\$
\$	Child support <u>RECEIVED</u> for all children. <b>Don't include foster care or adoption payments.</b>	\$
\$	Tax exempt interest income from IRS Form 1040 – line 8b or 1040A – line 8b.	\$
\$	Untaxed portions of pensions from IRS Form 1040 – lines (15a minus 15b) or 1040A – lines (11a minus 11b). <b>Exclude rollovers. If negative, enter zero here.</b>	\$
\$	Untaxed portions of pensions from IRS Form 1040 – lines (16a minus 16b) or 1040A – lines (12a minus 12b). <b>Exclude rollovers. If negative, enter zero here.</b>	\$
\$	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 worker's compensation, disability, etc. Do not include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, 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 the FAFSA.	XXXXXXXXXX

**G: Sign this Worksheet**

By signing this worksheet, I certify that all of the information reported to qualify for federal student aid is complete and correct. The student and at least one parent must sign and date

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

\_\_\_\_\_  
Student

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent

\_\_\_\_\_  
Date

**Do not mail this worksheet to the Department of Education. Don't forget to sign your tax forms. Submit this worksheet to your Financial Aid Office: 79 New Montgomery Street, San Francisco, CA 94105. FAX: 415-618-6273.**