

# 2011-2012 Verification Worksheet

Independent

## U.S. Department of Education 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) 2010 Federal tax forms with all attachments, schedules, W-2 forms, and other financial documents as requested. 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 need to make corrections electronically or by using your Student Aid Report (SAR).

Complete this Verification Worksheet 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: Complete form in INK (with a pen, not a pencil)

1. Collect your (and your spouse's) financial documents (signed Federal income tax forms, attachments, 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, W-2s, and other documents your school needs to the 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.	_____ Social Security Number
_____ Address (include apt. number)			_____ Date of birth
_____ City	_____ State	_____ ZIP code	_____ Phone number (include area code)

### B. Family Information

List the people in *your household*, including:

- yourself, and your spouse if you have one; and
- your children, if you will provide more than half of their support from July 1, 2011 through June 30, 2012, 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, 2011 through June 30, 2012.

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, 2011 through June 30, 2012, 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>Example: Martha Jones</i>	<i>24</i>	<i>Wife</i>	<i>City University</i>
		<b>Self</b>	

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

1. Check only one box below. Tax returns include the 2010 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 the 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 tax return with all attachments and schedules, and W-2s.
  - 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 2010 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. See Question 44 of the Free Application for Federal Student Aid (FAFSA).

Sources of Untaxed Income – Year 2010	Amount	Sources of Untaxed Income – Year 2010	Amount
Payments to tax-deferred pension & savings plans	\$	Untaxed portions of IRA distributions excluding rollovers	\$
IRA deductions & payments to Keogh, SEP, etc.	\$	Housing, food, other living allowances for military, clergy, etc.	\$
Child support received for all children	\$	Veterans noneducation benefits (e.g. Disability), VA Work-Study	\$
Tax exempt interest income	\$	Any untaxed funds – Workers' Compensation, disability, etc.	\$
Untaxed portions of pensions excluding rollovers	\$	<b>Money received, or paid on your behalf (e.g. bills)</b>	\$

3. If you did not file and are not required to file a 2010 Federal income tax return, list below your employer(s) and any income received in 2010 (use the W-2 form or other earnings statements if available.).

Sources – Year 2010	Amount
	\$
	\$

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

1. Check only one box below. Tax returns include the 2010 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 the 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 and your spouse's joint tax return with all attachments and schedules, and W-2s.
  - Check here and attach spouse's signed tax return, all attachments, schedules, and W-2s if your spouse filed a separate return.
  - Check here if a signed spouse's tax return will be submitted to the school by \_\_\_\_\_ (date).
  - Check here if your spouse will not file and is not required to file a 2010 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. See Question 45 of the Free Application for Federal Student Aid [FAFSA].

Sources of Untaxed Income – Year 2010	Amount	Sources of Untaxed Income – Year 2010	Amount
Payments to tax-deferred pension & savings plans	\$	Untaxed portions of IRA distributions excluding rollovers	\$
IRA deductions & payments to Keogh, SEP, etc.	\$	Housing, food, other living allowances for military, clergy, etc.	\$
Child support received for all children	\$	Veterans noneducation benefits (e.g. Disability), VA Work-Study	\$
Tax exempt interest income	\$	Any untaxed funds – Workers' Compensation, disability, etc.	\$
Untaxed portions of pensions excluding rollovers	\$	<b>Money received, or paid on your behalf (e.g. bills)</b>	\$

3. If your spouse did not file and is not required to file a 2010 Federal Income Tax Return, list below your spouse's employer(s) and any income received in 2010 (use the W-2 form or other earnings statements if available).

Sources – Year 2010	Amount
	\$
	\$

**E. Sign this Worksheet**

Each person signing this form certifies that all the information reported on it is complete and correct. If married, spouse's signature is optional.

\_\_\_\_\_  
Student's Signature Date

\_\_\_\_\_  
Spouse's Signature Date

*Do not mail this worksheet to the Department of Education. Submit this worksheet to your Financial Aid Administrator at your school. Don't forget to sign and date your tax forms and include all attachments, schedules, and W-2s.*

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