



# 2011-2012 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) 2010 Federal tax forms, 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, 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 electronically or by using your SAR.

### A. Student Information

Last name	First name	M.I.	Student ID	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, 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 at least half time between July 1, 2011 and 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
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. 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 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 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	2010 Amount	Sources of Untaxed Income	2010 Amount
a. Child Support	\$	d.	\$
b. Workman's Compensation	\$	e.	\$
c. Untaxed Pensions	\$	f.	\$

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	2010 Income
	\$
	\$
	\$

**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 your spouse did not keep a copy of the tax return, request a copy from the 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.
- Check here and attach spouse's signed tax return 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 44 of the FAFSA.)

Sources of Untaxed Income	2010 Amount	Sources of Untaxed Income	2010 Amount
a. Child Support	\$	d.	\$
b. Workman's Compensation	\$	e.	\$
c. Untaxed Pensions	\$	f.	\$

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	2010 Income
	\$
	\$
	\$

## E. Report Additional Financial Information

Student		Spouse
\$	On the day you submitted your FAFSA, what was your total current balance for your cash, savings and checking accounts?	\$
\$	On the day you submitted your FAFSA, what was the net worth of your investments, including real estate ( <i>not your home</i> )?	\$
\$	On the day you submitted your FAFSA, what was the net worth of your current businesses and/or investment farms? ( <i>Only report if your business or farm has 100 employees or more.</i> )	\$
\$	Education credits: Hope and Lifetime Learning tax credits. <i>IRS form 1040-line 49; IRS form 1040A-line 31</i>	\$
\$ _____	Child support <b>paid</b> because of divorce or separation or as a result of a legal requirement. Do NOT include support for children in your household, as reported in question 94. Please list the names of children receiving support: 1. _____ 4. _____ 2. _____ 5. _____ 3. _____ 6. _____	\$ _____
\$	Taxable earnings from need-based employment programs. <i>i.e. federal Work-Study, need-based employment portions of fellowships and assistantships</i>	\$
\$	Student grant and scholarship aid reported to the IRS in your adjusted gross income. <i>Includes: AmeriCorps benefits (awards, living allowances and interest accrual payments) and grant and scholarship portions of fellowships and assistantships.</i>	\$
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. <i>Reported on the W-2 in Box 12, Code Q</i>	\$
\$	Cooperative education program earnings.	\$
\$	←Total from STUDENT column	Total from SPOUSE column→
		\$

## F. Report Untaxed Income

Student		Spouse
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings). <i>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.</i>	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans <i>IRS form 1040-line 28 plus line 32; IRS form 1040A-line 17</i>	\$
\$	Child support <b>received</b> for all children. Do NOT include foster care or adoption payments.	\$
\$	Tax exempt interest income <i>IRS form 1040-line 8b; IRS form 1040A-line 8b</i>	\$
\$	Untaxed portions of IRA distributions. Exclude rollovers. If negative, enter a zero here. <i>IRS form 1040-line 15a minus 15b; IRS form 1040A-line 11a minus 11b</i>	\$
\$	Untaxed portions of pensions. Exclude rollovers. If negative, enter a zero here. <i>IRS form 1040-line 16a minus 16b; IRS form 1040A-line 12a minus 12b</i>	\$
\$	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 workers' compensation, disability, etc. <b>Do NOT include:</b> <i>student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Workforce Investment Act educational benefits, combat pay (if you are not a tax filer), benefits from flexible spending arrangements, (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.</i>	\$ _____
\$	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	<b>Do not report</b>
\$	←Total from STUDENT column	Total from SPOUSE column→
		\$

## G. Sign this Worksheet

Each person signing this form certifies that all the information reported on it is complete and correct. (*Spouse signature optional*)

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

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

Submit this worksheet to OIT's Financial Aid office. ~ Don't forget to sign your tax forms.