



# 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, your school may send corrections electronically.

Complete this verification form and submit it to the Office of Financial Aid as soon as possible, so that your financial aid will not be delayed. The Office of Financial Aid is available to assist 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 a financial aid representative if you have questions about completing this worksheet.
3. Complete and sign the worksheet.
4. Take the completed worksheet, tax forms, and any other documents your school needs to the Office of Financial Aid.
5. A financial aid representative will compare information on the documents with the information you submitted on your application.

*Your school must review the requested information, under the financial aid program rules (34 CFR, Part 668).*

**A. Student Information**

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Last Name	First Name	M.I.
Address (include apartment number)		@ _____ HU ID
City	State	Zip Code
Telephone number (include area code)		Social Security Number
		Date of Birth

**B. Family Information**

List the people in your household; include the following:

- 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 spaces below. Also write in the **name of the college** for any household member, who will be attending college at least half-time between July 1, 2008 and June 30, 2009, and who 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	Bowie State University
		Self	Howard University

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: U.S. Department of Education, Washington, DC 20202-5345.

- Check one box only.** Tax returns include the 2007 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 a copy of an Internal Revenue Service form that lists tax account information.

Check and attach signed tax return and **complete worksheets A, B, and C on the next page.**

Check here if you will not file and are not required to file a 2007 U.S. Income Tax Return, **complete item 2 below and complete worksheets A, B, and C on the next page.**
- 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 (**Attach the W-2 form(s) or other earnings statements**).

List Sources/Employers	List 2007 Amounts – Attach W2 Forms
	\$
	\$
	\$

- Check here IF YOU DID NOT WORK.**

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

- Check one box only.** Tax returns include the 2007 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 a copy of an Internal Revenue Service form that lists tax account information.

Check if you and your spouse filed a joint return and **complete worksheets A, B, and C on the next page.**

Check and attach signed tax return if your spouse filed a separate return and **complete worksheets A, B and C on the next page.**

Check here if your spouse will not file and is not required to file a 2007 U.S. Income Tax Return, **complete item 2 below and complete worksheets A, B, and C on the next page.**
- If your spouse did not file and is not required to file a 2007 Federal income tax return, list below your spouse's employer(s) and any income received in 2007 (**Attach the W-2 form(s) or other earnings statements**).

List Sources/Employers	List 2007 Amounts – Attach W2 Forms
	\$
	\$
	\$

- Check here IF YOUR SPOUSE DID NOT WORK.**

**E. Sign this Worksheet**

By signing this worksheet, I (we) certify that all the information reported on it is complete and correct. If married, spouse's signature is optional.

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

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Area Code and Daytime or Mobile Telephone number

\_\_\_\_\_  
Student's Email address

\_\_\_\_\_  
Spouse's Signature (Optional)

\_\_\_\_\_  
Date

**INCOMPLETE FORMS WILL BE RETURNED TO YOU UNPROCESSED**

# Worksheets

Calendar Year 2007

Student Name: \_\_\_\_\_

\*Read carefully and report only information reported on the FAFSA

\*Report \$0 if no income was received in a particular category

Student/Spouse

## Worksheet A

### Report Annual Amounts

\$	Earned income credit from IRS Form 1040-line 66a; 1040A-line 40a; 1040EZ-line 8a.
\$	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 as reported on your FAFSA, that were not taxed (such as SSI).
\$	_____ Total

## Worksheet B

### Report Annual Amounts

\$	Payments to tax deferred pension and savings plans (paid directly from earnings), including, but not limited to amounts reported on the W-2 Form in Boxes 12a thru 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-line 28 and 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 17 (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 workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. <b>Tax filers only:</b> report combat pay not included in AGI. <b>Don't include</b> 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, in-kind support), not reported elsewhere on this form.
\$	_____ Total

## Worksheet C

### Report Annual Amounts

\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31.
\$	Child support <b>paid</b> because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household.
\$	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 adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.
\$	_____ Total