U.S. Department of Education

Independent

# 2009-2010 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) 2008 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

Last Name ______ First Name ______ M.I. ______

Address (include apartment number) ______

@ ______
HU ID

City ______ State ______ Zip Code ______

Social Security Number ______

Telephone number (include area code) ______

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, 2009 through June 30, 2010, 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, 2009 through June 30, 2010.

Write the **names of all household members** in the spaces below. Also write in the **name of the college** for any household member (**except your parents**) who will be attending college at least half-time between July 1, 2009 and June 30, 2010, 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 |
|---|---|---|---|
| ***Missy Jones*** (example) | ***18*** | ***Sister*** (example) | ***Bowie State University*** (example) |
| | | Self | Howard University |
| | | Spouse | |
| | | Child | |
| | | | |
| | | | |
| | | | |

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

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 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 here and attach a signed copy of your tax return and **complete the <u>2008 Additional Financial Information</u> on the next page.**

   ☐ Check here if you will not file and are not required to file a 2008 U.S. Income Tax Return, **complete item 2 below and complete the <u>2008 Additional Financial Information</u> on the next page.**

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 (**Attach the W-2 form(s) or other earnings statements).**

| List Sources/Employers | List 2008 Amounts – Attach W2 Forms |
|---|---|
| | $ |
| | $ |
| | $ |

3. ☐ **Check here IF YOU DID NOT WORK.**

## D. Spouse'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 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 here and attach a signed copy of your spouse's tax return(s) and **complete the <u>2008 Additional Financial Information</u> on the next page.**

   ☐ Check here if your spouse will not file and is not required to file a 2008 U.S. Income Tax Return, **complete item 2 below and complete the <u>2008 Additional Financial Information</u> on the next page.**

2. If your spouse did not file and is not required to file a 2008 Federal income tax return, list below your spouse's employer(s) and any income received in 2008 (**Attach the W-2 form(s) or other earnings statements**).

| List Sources/Employers | List 2008 Amounts – Attach W2 Forms |
|---|---|
| | $ |
| | $ |
| | $ |

3. ☐ **Check here IF YOUR SPOUSE DID NOT WORK.**

## E. Sign this Worksheet

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

**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)

**<u>INCOMPLETE FORMS WILL BE RETURNED TO YOU UNPROCESSED</u>**

Independent

Howard ID #: @__________________ Student Name:______________________________________

**Report Annual Amounts**
Calendar Year 2008

*Read carefully and report only information reported on the FAFSA
*If any of the following items does not apply, enter zero

## 2008 Additional Financial Information

| Student's | | Spouse's |
|---|---|---|
| $ | Educational 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 – 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. | $ |
| $ | Grant and scholarship aid reported to the IRS in the adjusted gross income – includes Americorps benefits (awards, living allowances and interest accrued payments), as well as grant and scholarship portions of fellowships and assistantships. | $ |
| $ | Combat pay or special combat pay – 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). | $ |

## 2008 Untaxed Income

| Student's | | Spouse'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 Form in Boxes 12a through 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 + line 32 or 1040A-line 17. | $ |
| $ | Child support **received** 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. | $ |
| $ | 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. | $ |
| $ | 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. **Don't include** student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security, 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, in-kind support), not reported elsewhere on this form. | $ |