

## 2008-2009 Financial Aid Verification Worksheet

## Federal Student Aid Programs

### WHAT YOU SHOULD DO:

1. You (the student) and your parent(s) are required by regulation to submit a signed copy of all 2007 Federal Income Tax returns, which include the 2007 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico, or a foreign tax return. Collect your (and your spouse's or parents') financial documents (signed Federal income tax forms, W-2, etc.).
2. **Complete each section and sign this worksheet** - you (and your parent if appropriate).
3. Talk to your financial aid administrator if you have questions about completing this worksheet.
4. Take/send the completed worksheet, tax forms, and any other requested documents to your financial aid administrator.
5. Your financial aid administrator will compare information on these documents and make corrections if necessary.

### A. Student Information

<i>Last Name</i>	<i>First Name</i>	<i>M.I.</i>	<i>Social Security Number</i>
<i>Address (include apt. #)</i>		<i>Date of birth</i>	
<i>City</i>	<i>State</i>	<i>Zip Code</i>	<i>Phone Number (include area code)</i>

### B. Family Information

**Independent Students:** List the people in your household; include (a) yourself, your spouse if married; (b) your children, if you provide more than half of their support from July 1, 2008 through June 30, 2009; and (c) any other people if they now live with you, and you provided 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.

**Dependent Students:** List the people in your household. Include (a) yourself; (b) parent(s) you live with (including stepparents); (c) other children who live in this household; and (d) any 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, 2008 through June 30, 2009. You may also include children who do not live within this household, providing that (1) the parents listed below provide more than half of their support from July 1, 2008 through June 30, 2009, or (2) if the parents would be required to give parental information when applying for Federal student aid;

**WRITE IN THE NAMES OF ALL HOUSEHOLD MEMBERS.** Also write in the name of the college for any family member excluding your parent(s), who will be attending college at least half-time between July 1, 2008 and June 30, 2009, and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	2008-09 College
<i>Example: John Doe</i>	<i>48</i>	<i>Father</i>	
		Self	Ottawa University

# Student and Parent Income Information

Check the box for those people who **did not file** and **were not required to file** a 2007 Federal Income Tax Return.

- You (student)                     
  Father (step-father)                     
  Mother (step-mother)

**For only those persons checked**, list below the employer(s), who earned the income, and any income received in 2007 (use W-2 forms or other earning statements).

Sources of Income (Employer)	Student, Father, or Mother?	2007 Income
		\$
		\$
		\$
		\$

## Worksheets A & B

**DO NOT LEAVE AN ANSWER BLANK! If answer is -0- Please write -0-.**

Student/Spouse	Calendar Year 2007	Parent(s)
\$	Earned income credit from IRS form 1040-line 66a; 1040A-line 40a; 1040EZ-line 8a.	\$
\$	Additional child care 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 that were not taxed (such as SSI)	\$
\$	<b>WORKSHEET A TOTAL</b>	\$
\$	Payments to tax-deferred pensions and savings plans (paid directly or withheld from earnings) including, but not limited to, amounts reported on W-2 Form 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-total of lines 28+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 pensions/IRA's from IRS Form 1040-lines (15a minus 15b)+(16a minus 16b) or 1040A-lines (11a minus 11b)+(12a minus 12b) excluding rollovers	\$
\$	Credit for federal tax on special fuels from IRS Form 4136-line 18-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	\$
\$	Any other untaxed income and benefits not reported elsewhere such as worker's compensation, untaxed portions of Railroad Retirement Benefits, Black Lung Benefits, disability, Refugee Assistance, etc. <b>Tax filers only: report combat pay not included on AGI (FAFSA questions 35 and 79). Don't include</b> student aid, WIA 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 any money paid on your behalf (e.g bills), not reported elsewhere on this form.	<b>\$XXXXXXXX</b>
\$	<b>WORKSHEET B TOTAL</b>	\$

### Sign this Worksheet

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. If dependent, at least one parent must sign. **Warning:** If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both

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

\_\_\_\_\_ Date \_\_\_\_\_  
Parent's Signature (Dependent Students Only)