

## 2009-2010 Verification Worksheet for Federal Student Aid Programs

Your application for Federal Financial Aid 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 parent's) 2008 Federal 1040, 1040A, 1040EZ tax forms, 2008 W-2 forms, and other financial documents. The law says the school has the right to ask for this information before awarding Federal aid. If there are differences between your application information and your financial documents, your school may need to make corrections electronically by using your Student Aid Report (SAR).

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

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. **Don't forget to submit signed copies of your (and your parent's) 2008 Federal income tax forms (1040, 1040A, 1040EZ), and copies of your 2008 W-2s.**

### A. Student Information

Last Name	First Name	M.I.	Social Security Number or ID
Address			Date of Birth
City	State	Zip Code	(     ) Phone number

### B. Family Information

List the people in your PARENT(s) household:

- yourself and your parent(s) (including stepparent) even if you don't live with your parents, and
- your parent's other children, even if they don't live with your parent(s), if (A) your parents will provide more than half of their support from July 1, 2009 through June 30, 2010, or (B) the children would be required to provide parental information when applying for Federal Student Aid, and
- 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, 2009 through June 30, 2010.

**You must provide proof of support for these individuals.**

Write the names of ALL household members in the space below. Write the name of the college for any household member, except your parent(s), who will be attending college at least halftime for one term between July 1, 2009 and June 30, 2010, 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
Matt Smith (example)	20	Self	ETSU

### C. Student's Federal Tax Forms and Income Information (all must complete)

- 1 Check only ONE of the boxes below. Tax returns include the 2008 Federal Income Tax Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax form. If you did not keep a copy of your 2008 Federal Income Tax Form, request a copy from your tax preparer or request an Internal Revenue Service (IRS) form that lists tax account information.

- Attached are SIGNED tax returns and all W-2 forms.
- A SIGNED tax return will be submitted to the school by \_\_\_\_\_(date).
- You will not file AND are not required to file a 2008 U.S. Federal Income Tax Return.  
Please complete section 2.

- 2 If you did not file and are not required to file a 2008 U.S. Federal income tax return, complete the following chart. List your employer(s) and any income received in 2008. Use the W-2 form issued by your employer or other earnings statements available.

Source/Employer	2008 Income Amount

- 3 Attach copies of ALL W-2's received from your employer(s) for 2008 income earned.

### D. Parent(s) Tax Forms and Income Information

- 1 Check only ONE of the boxes below. Tax returns include the 2008 Federal Income Tax Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax form. If your parent did not keep a copy of their 2008 Federal Income Tax Form, request a copy from their tax preparer or request an Internal Revenue Service (IRS) form that lists tax account information.

- Attached are parent(s) SIGNED tax return and all W-2 forms.
- A SIGNED parent(s) tax return will be submitted to the school by \_\_\_\_\_(date).
- Your parent will not file AND is not required to file a 2008 U.S. Federal Income Tax Return.  
Please complete section 2.

- 2 If your parent did not file and is not required to file a 2008 U.S. Federal income tax return, complete the following chart. List your parent's employer(s) and any income received in 2008. Use the W-2 form issued by their employer or other earnings statements available.

Source/Employer	2008 Income Amount

- 3 Attach copies of ALL W-2's received from the employer(s) for 2008 income earned.



Complete each blank of these worksheets. Enter '0' where applicable.

**F. Additional Financial Information for year 2008 - Continued**

Student	Parents
Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 - line 50; or 1040A - line 31	
\$ _____	\$ _____
Child support you paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your (or your parents') household. <b>List Children child support paid for:</b> _____ _____	\$ _____
\$ _____	\$ _____
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 (or your parents') adjusted gross income. Includes Americorps benefits (awards, living allowances and interest accrual payments), as well as grant or scholarship portions of fellowships or assistantships	
\$ _____	\$ _____

**G. Asset Information (all applicants must complete)**

Complete each blank of these worksheets. Enter '0' where applicable.

Student	Parents
As of the day you completed your FAFSA, what was the total balance of cash, savings, and check accounts. (Do not include student financial aid)	
\$ _____	\$ _____
As of the day you completed your FAFSA, what was the net worth of investments, including real estate. Net worth means current value minus debt. Investments INCLUDE real estate, trust funds, money market funds, mutual funds, certificates of deposits, stocks, stock options, bonds, other securities. Coverdell savings accounts, college savings plans, installment and land sale contracts (including mortgages held), commodities, etc. Investment value includes the market value of these investments as of today. Investment debt means only those debts that are related to the investments. Investments DO NOT include the home you live in, the value of life insurance, retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc) and prepaid tuition plans, or cash savings, and checking accounts already reported above.	
\$ _____	\$ _____
As of the day you completed your FAFSA, what was the net worth of current businesses and/or investment farms. Do not include a farm that your or your parents live on and operate.	
\$ _____	\$ _____

**H. Signatures**

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

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

Student	Date
Parent	Date

At least ONE parent must sign