

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 spouse's, if you are married) 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 (any your spouse's, if you are married) 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 household:

- yourself, and
- your spouse, if you have one, and
- your children, if you provide more than half of their support from July 1, 2009 through June 30, 2010, 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.

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)	25	Self	ETSU

Return completed and signed form to the ETSU Financial Aid Office

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

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 spouse 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.

- You and your spouse did or will file a joint 2008 Federal Income Tax Form 1040 or 1040A
- Attached are spouse's SIGNED tax return if your spouse filed a separate return and all W-2 forms.
- A SIGNED spouse's tax return will be submitted to the school by _____(date).
- Your spouse will not file AND is not required to file a 2008 U.S. Federal Income Tax Return. Please complete section 2.

2 If your spouse did not file and is not required to file a 2008 U.S. Federal income tax return, complete the following chart. List your spouse'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 your spouse's employer(s) for 2008 income earned.

E. All applicants must complete Untaxed Income for 2008

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

Student/Spouse	Parents
\$ _____	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 N/A
\$ _____	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 N/A
\$ _____	Child support you received for all children. Don't include foster care or adoption payments. N/A
\$ _____	Tax exempt interest income from IRS Form 1040 - line 8b; or 1040A - 8b N/A
\$ _____	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. N/A
\$ _____	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. N/A
\$ _____	Housing, food and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits) N/A
\$ _____	Veterans' noneducational benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances N/A
\$ _____	Other untaxed income not reported (i.e. Workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc.) Do not include 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. N/A
\$ _____	Money received, or paid on your behalf, not reported elsewhere on this form (i.e. money, gifts, and loans, plus housing, food, clothing, car payments or expenses, medical and dental care, and college costs) N/A

F. Additional Financial Information for year 2008

Student	Parents
\$ _____	Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Combat pay is reported on the W-2 in Box 12, code Q. N/A

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

F. Additional Financial Aid Information for year 2008 - Continued

Student/Spouse	Parents
\$ Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 - line 50; or 1040A - line 31	N/A
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. List Children child support paid for: _____ _____	N/A
\$ Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships	N/A
\$ 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	N/A

G. Asset Information (all applicants must complete)

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

Student/Spouse	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)	N/A
\$ 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.	N/A
\$ 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.	N/A

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
_____	_____
Spouse If married, spouse MUST sign	Date