

INDEPENDENT VERIFICATION WORKSHEET FOR 2008-2009

Student Name: _____

Banner ID: _____

The federal government selected your financial aid application (FAFSA) for a secondary review process called verification. In this process, our office is required to compare information on your FAFSA to information on you and your spouse's 2007 Federal 1040, 1040A, or 1040EZ Tax Returns. Federal regulations grant our office the authority to request this information before awarding Federal aid (*34 CFR, Part 668*). If there are differences, our office will submit corrections to your FAFSA electronically.

INSTRUCTIONS

1. Complete all sections of this worksheet. If the information being requested is not applicable, write "none" or "\$0" where appropriate.
2. Sign and date this worksheet (Section H).
3. Attach **signed** copies of your and your spouse's 2007 Federal Tax Return (pages 1 and 2). If a tax preparer completed your taxes, the preparer's signature is sufficient. If you did not keep a copy, you can request a copy from the IRS by calling 1-800-829-1040.
4. Return this worksheet to the Financial Aid Office with all appropriate signed tax returns.

SECTION A - HOUSEHOLD INFORMATION

1. List the people in your household, include:
 - 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.
2. For each person you list, write their relationship to you: wife, son, daughter, father, sister, etc...
3. For each person you list, write their age.
4. For each person you list, write the college name that they will attend at least 1/2 time in a degree, diploma, or certificate program in 2008-2009.

Full Name	Relationship	Age	College Attending During 2007-2008
Sally Smith (example)	Wife	28	Central University
	Self		SUNY Plattsburgh

SECTION B - MARITAL STATUS

What was your marital status when you filed your 2008-2009 FAFSA (check one box)?

- | | | |
|----------------------------------|------------------------------------|-------------------------------------|
| <input type="checkbox"/> Single | <input type="checkbox"/> Separated | <input type="checkbox"/> Widowed |
| <input type="checkbox"/> Married | <input type="checkbox"/> Divorced | <input type="checkbox"/> Re-Married |

See Reverse Side

SECTION C - STUDENT INCOME TAX FILING STATUS

Did you, the student, file a 2007 federal tax return (1040, 1040A, 1040EZ)?

- Yes - Proceed to *Section E* and remember to submit a copy of your 2007 Federal Tax Return
 No - Complete *Section D*

SECTION D - STUDENT WAGES

Only complete the table below if you answered no to *Section C*. List below your employer(s) and any income earned in 2007. If you did not earn any income in 2007, **enter zero**:

Source (from W-2 or other earnings statements)	Amount
Cashier at Wal-Mart (example)	\$1,250
	\$
	\$

SECTION E - SPOUSE INCOME TAX FILING STATUS

Did your spouse file a 2007 federal tax return (1040, 1040A, 1040EZ)?

- I am not married - Proceed to *Section G*
 Yes - Proceed to *Section G* and remember to submit a copy of your spouse's 2007 Federal Tax Return
 No - Complete *Section F*

SECTION F - SPOUSE WAGES

Only complete the table below if you answered no to the question in *Section E*. List below your spouse's employer(s) and any income earned in 2007. If he or she did not earn any income in 2007, enter zero:

Source (from W-2 or other earnings statements)	Amount
Cashier at Wal-Mart (example)	\$1,250
	\$
	\$

SECTION G – UNTAXED INCOME

List any untaxed income that you and your spouse (if applicable) received in 2007. **If you or your spouse did NOT receive any untaxed income, ENTER ZERO in each row:**

Type of Untaxed Income	Student Amount	Spouse Amount
Welfare benefits including temporary assistance for need families (TANF)	\$	\$
Social Security Benefits not taxed (Federal Form 1099)	\$	\$
Payments to tax-deferred pension and savings plans (W-2 Statement, Box 12)	\$	\$
Child support RECEIVED BY YOU for all children	\$	\$
Living allowances (military, clergy, other)	\$	\$
Veterans' non-education benefits	\$	\$
Money received or paid on your behalf (e.g., gifts, bills)	\$	\$
Other untaxed income (e.g. workers' compensation, etc)	\$	\$
Child support PAID BY YOU for all children	\$	\$

SECTION H – SIGNATURES AND ATTACHMENTS

By signing this worksheet I certify that all information reported is complete and accurate. If false or misleading information is purposely provided on this worksheet or FAFSA, I understand we may be fined, sentenced to jail, or both.

 Student Signature

 Date

 Spouse Signature (optional)

 Date

Whose **signed** 2007 Federal Tax Returns did you attach?

Student

Spouse