

2002-2003 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 2001 federal tax forms (and your spouse's if you are married, or parents' if you are considered dependent for federal aid purposes). The law says we have the right to ask you for this information before awarding Federal aid. If there are differences between your application and documents corrections may need to be submitted. Try to complete verification as soon as possible, so that your financial aid won't be delayed. Your school must review the requested information, under the financial aid program rules.

What you should do:

1. Collect your (and your spouse's or parents') financial documents (signed Federal income tax forms, W-2, etc.).
2. Talk to your financial aid administrator if you have questions about completing this worksheet.
3. **Complete the sections checked and sign the worksheet - you (and your parent if appropriate).**
4. Take the completed worksheet, tax forms, and any other documents to your financial aid administrator.
5. Your financial aid administrator will compare information on these documents and make corrections if necessary.

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> |

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, 2002 through June 30, 2003; 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, 2002 through June 30, 2003.
- Dependent Students:** List the people in your parent's household; include (a) yourself, your parent(s) you live with (include stepparent); (b) your parents' other children, even if they don't live with your parent(s), if (1) your parents provide more than half of their support from July 1, 2002 through June 30, 2003, or (2) if they would be required to give parental information when applying for Federal student aid; and (c) any other people if they now live with your parents, and your parents provided more than half of their support and will continue to provide more than half of their support from July 1, 2002 through June 30, 2003.

Write 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, 2002 and June 30, 2003, and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

| Full Name | Age | Relationship | College |
|------------------------------|-----------|--------------|------------------------|
| <i>Example: Martha Jones</i> | <i>24</i> | <i>Wife</i> | <i>City University</i> |
| | | Self | |
| | | | |
| | | | |
| | | | |
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Tax Forms and Income Information

All tax filers must submit a signed copy of all 2001 Federal Income Tax returns (includes the 2001 IRS Form 1040, 1040A, 1040EZ, Telefile Tax Record, a tax return from Puerto Rico or a foreign income tax return) for those people checked below:

- You Your spouse Your father Your mother

If you did not keep a copy of your tax return, you must request form 1722 from the Internal Revenue Service by calling 1-800-829-1040.

Check the box for those people who did not and are not required to file a 2001 Federal Income Tax Return. List below your employer(s) and any income received in 2001 (use W-2 forms or other earning statements).

- You Your spouse Your father Your mother

| Name of Employer | Student Amount | Spouse or Parent(s) Amount |
|------------------|----------------|----------------------------|
| | | |
| | | |
| | | |

Both tax filers and non-tax filers must list any untaxed income received in 2001. Be sure to enter zeros if no funds were received. (See Worksheet A, B and C of the Free Application for Federal Student Aid)

| Student (spouse) | Calendar Year 2001 | Parent(s) |
|------------------|---|------------|
| \$ | Earned Income Credit | \$ |
| \$ | Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps. | \$ |
| \$ | Social Security payments that were not taxed. | \$ |
| \$ | Child Tax Credit from IRS 1040-line 62 or 1040A-line 39 | \$ |
| \$ | Payments to tax-deferred pensions and savings plans (paid directly or withheld from earnings) as reported on W-2 Form Box 13, codes D, E, F, G, H, and S. Include untaxed portions of 401(k) and 403(b) plans. | \$ |
| \$ | IRA deductions & payments to self-employed SEP, SIMPLE and Keogh & other qualified plans from IRS Form 1040-total lines 23 +29 or 1040A-line 16 | \$ |
| \$ | Child support received for all children. Don't include foster care. | \$ |
| \$ | Tax exempt interest income from IRS 1040 or 1040A-Line 8b or Foreign Income Exclusion from IRS 2555-line 43 or 2555EZ-line 18 or Credit for federal tax on special fuels from IRS 4136-line 9—non-farmers only | \$ |
| \$ | Housing, food, and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). | \$ |
| \$ | Workers' Compensation | \$ |
| \$ | Veterans' non-education benefits, such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) | \$ |
| \$ | Any other untaxed income and benefits, such as VA Educational Work-Study allowances, untaxed portions of Railroad Retirement Benefits, Black Lung Benefits, Refugee Assistance, etc. Don't include student aid, WIA benefits, or benefits from flexible spending arrangements, e.g., cafeteria plans. | \$ |
| \$ | Cash or any money paid on your behalf, not reported elsewhere on this form. | \$XXXXXXXX |
| \$ | Education Credits IRS Form 1040-line 46 or 1040A-line 29 | \$ |
| \$ | Child Support paid. Do not include support for children in your household. | \$ |
| \$ | Taxable earnings from Federal Work-Study or other need based programs | \$ |
| \$ | Student grant, scholarship or fellowship aid including AmeriCorp awards reported to the IRS | \$ |

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 \$10,000.00, be sent to prison, or both.

Student's Signature Date _____
Parent's Signature (Dependent Students Only) Date