



WILLIAM JEWELL COLLEGE

FINANCIAL AID APPLICATION SUPPLEMENT
Request for 2009-2010 FAFSA Recalculation

Name, SSN, Address, City, ST, ZIP, WJC Student ID, Date of Birth, Home Phone Number, Student E-mail

William Jewell College recognizes that special or extraordinary circumstances can impact the financial resources a student and his/her family have set aside to pay the expenses of attending the College.

- Review the following condition(s) to determine if any apply to you
Obtain the required supporting documents and/or letters of explanation
Respond completely and accurately to the appropriate questions
Submit to the Office of Financial Aid and Scholarship Services

If the total income for you, your parent(s) (dependent students only), or your spouse will be lower for the 2009 calendar year than it was for the 2008 calendar year, complete the following section.

1. A reduction in income and/or benefits has occurred for the (check only one):

Student, Spouse, Father/stepfather, Mother/stepmother

2. What caused this reduction in income/benefits? Check all that apply:

Change in employment, Unemployment, Divorce or separation, Death of the individual, Disability, Loss of financial benefits

\*A letter of explanation must be provided for each occurrence listed above. Include the date the reduction became effective, the amount of benefits received up to the reduction, and estimate the amount of benefits expected to be received from the date of reduction to year end.

3. Complete and submit the 2009-2010 Verification Worksheet and tax documents required therein.

4. List the total expected employment income (and all other benefits to be received) during the 12-month 2009 calendar year (January through December) for all family members:

Table with 4 columns: Student earnings from work, Spouse earnings from work, Mother earnings from work, Father earnings from work, Unemployment Benefits, Worker's Compensation, Veteran's Benefits, Living/housing/food allowances, Child Support Received, Other Benefits (explain)

Total income for the 12-month 2009 year \$

If other circumstances have caused your/your family's financial resources to be significantly lower for the 2009 calendar year than in 2008, attach a letter of explanation, and include any documents that might help clarify your special situation.

I (we) certify that the information provided on this document is true and accurate to the best of my (our) knowledge. I (we) agree to notify the Office of Financial Aid and Scholarship Services if the above information changes following the submission of this document.

Student Signature, Date, Father/stepfather Signature, Date, Mother/stepmother Signature, Date



# WILLIAM JEWELL COLLEGE

## VERIFICATION OF FEDERAL FINANCIAL AID 2009-2010 FAFSA Verification Documentation Requirements

Name \_\_\_\_\_ WJC Student ID \_\_\_\_\_  
 SSN \_\_\_\_\_ Date of Birth \_\_\_\_\_  
 Address \_\_\_\_\_ Home Phone Number \_\_\_\_\_  
 City \_\_\_\_\_ ST \_\_\_\_\_ ZIP \_\_\_\_\_ Student E-mail \_\_\_\_\_

The Federal Government has randomly selected your 2009-2010 application for review in a process called "Verification". Based on this random selection, you are **required** to submit the following documents to the William Jewell College Office of Financial Aid and Scholarship Services to complete the verification requirements:

1. Signed photocopy of **students** (and spouse, if applicable) **2008 Federal Income Tax Return** (IRS Form 1040 pages 1-2 and Schedule C, if applicable) and all related **W-2s**.

- I did not and am not required to file a 2008 Federal IRS income tax return. I have provided my W2's, the amount of income earned and the source of earnings: \$ \_\_\_\_\_ Source \_\_\_\_\_ Initial \_\_\_\_\_
- My spouse (if married), did not and is not required to file a 2008 Federal IRS income tax return. I have provided my spouse's W2's, the amount of income earned and the source of earnings: \$ \_\_\_\_\_ Source \_\_\_\_\_ Initial \_\_\_\_\_

2. Signed photocopy of your **parents'** **2008 Federal Income Tax Return** (IRS Form 1040 pages 1-2 and Schedule C, if applicable) and all related **W2's**.

- As parent(s), I (we) did not file and am (are) not required to file a 2008 Federal IRS income tax return. I have provided my (our) W2's, the amount of income earned and the source of earnings: \$ \_\_\_\_\_ Source \_\_\_\_\_ Initial \_\_\_\_\_

**Note: If you do not have copies of your 2008 tax return, please call (800)829-1040 to request a "Tax Transcript" for tax year 2008.**

3. **Provide the names of all household members.** Dependent students (refer to your Student Aid Report) must include parents even if you don't live with your parents. Also write the name of the college for any household member, excluding parent(s), who will be attending college at least half-time 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. For assistance determining your dependency status, refer to the attached *Household Member Worksheet*.

FULL NAME	AGE	RELATIONSHIP	COLLEGE
		SELF	WJC

By signing this worksheet, we certify that all of the information reported is complete and correct.

**Student Signature** \_\_\_\_\_ Date \_\_\_\_\_  
**Spouse (students) Signature** \_\_\_\_\_ Date \_\_\_\_\_  
**Father/stepfather Signature** \_\_\_\_\_ Date \_\_\_\_\_  
**Mother/stepmother Signature** \_\_\_\_\_ Date \_\_\_\_\_

Student	2008 UNTAXED INCOME	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	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040-total of lines 28 + 32 or 1040A-line 17	\$
\$	Child support you received 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	\$
\$	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.	\$
\$	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.	\$
\$	Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits)	\$
\$	Veterans' noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances	\$
\$	Other untaxed income not reported elsewhere on Worksheets A and B, such as workers compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Tax filers only: report combat pay not included in AGI. <b>Don't include</b> student aid, Workforce Investment Act educational 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 paid on your behalf (e.g., bills), not reported elsewhere on this form	xxxxxxxxxxxx
\$	<b>TOTAL</b> -----	<b>TOTAL</b> \$
Student	2008 ADDITIONAL FINANCIAL INFORMATION	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, as reported in question 96 (or question 75 for your parents).	\$
\$	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 and assistantships.	\$
\$	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.	\$
\$	<b>TOTAL</b> -----	<b>TOTAL</b> \$
STUDENT INITIAL & DATE-----		PARENT INITIAL & DATE

The above requested documents and information are required to confirm your eligibility for Federal Financial Aid. You must comply with this request within 30 days. Failure to comply within this time period may result in delay of your financial aid award and/or loss/cancellation of Federal financial aid.

If your application is adjusted due to corrections resulting from the verification process, you will be notified. It may be necessary to submit changes and/or adjustments to the Federal Processor. Generally, this procedure can be accomplished electronically by the Office of Financial Aid and Scholarship Services. If not, you will be required to submit the corrections via the hard copy Federal Student Aid Report.

**William Jewell College must review the requested information** under the financial aid program rules (34 CFR, Part 668). The law says we have the right to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, you may need to submit corrections on your Student Aid Report (SAR), or the college may send corrections electronically, to have your information reprocessed.

**Warning:** Purposely providing false or misleading information on this worksheet may result in a fine, jail sentence or both.

WILLIAM JEWELL COLLEGE  
OFFICE OF FINANCIAL AID AND SCHOLARSHIP SERVICES  
500 COLLEGE HILL, CAMPUS BOX 2005  
LIBERTY, MO 64068  
FAX: (816) 415-5006

## HOUSEHOLD MEMBER WORKSHEET

This worksheet may be used by the student to determine who is considered a member of the household by the U.S. Department of Education. **This worksheet is not required** by the Office of Financial Aid & Scholarships Services and is intended for reference use only. However, documentation may be requested to substantiate your household size.

A student's household is determined by the student's dependency status as defined by the U.S. Department of Education. Refer to Step Three of the FAFSA or see your Federal Student Aid Report (SAR) to review your answers.

### Answer all questions in this step to determine your household:

• Were you born before January 1, 1986?	Yes	No
• As of today, are you married? (Answer "Yes" if you are separated but not divorced.)	Yes	No
• At the beginning of the 2009-2010 school year, will you be working on a master's or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD, or graduate certificate, etc.)?	Yes	No
• Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?	Yes	No
• Are you a veteran of the U.S. Armed Forces?	Yes	No
• Do you have children who will receive more than half of their support from you between July 1, 2009, and June 30, 2010?	Yes	No
• Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2010?	Yes	No
• At any time since you turned age 13 or older, were both your parents deceased, were you in foster care or were you a dependent/ward of the court?	Yes	No
• Are you or were you an emancipated minor as determined by a court in your state of legal residence?	Yes	No
• Are you or were you in legal guardianship as determined by a court in your state of legal residence?	Yes	No
• At any time on or after July 1, 2008 did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless?	Yes	No
• At any time on or after July 1, 2008, did the director of an emergency shelter program or transitional housing program funded by the U.S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless?	Yes	No
• At any time on or after July 1, 2008, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?	Yes	No

### If you responded with at least one "Yes" answer above, your household must 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, 2009 through June 30, 2010, and
- Other people if they live with you, and you provide more than half of their support and will continue to provide more than half of support from July 1, 2009 through June 30, 2010.

### If you responded with all "No" answers above, your household must include:

- Yourself and your parent(s) (including stepparent) even if you don't live with your parent(s), and
- Your parents' 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 parent(s), and your parent(s) 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.

In the case of parental divorce or separation, a student must provide the parental information of the parent that provides them more than half of their support. Students can not choose the parent of record for FAFSA reporting.

*Note: You are not required to turn this page in to the Office of Financial Aid and Scholarship Services. However, should your household size come into question, you may be required to substantiate your dependency status with supporting documentation. Questions may be directed to:*

WILLIAM JEWELL COLLEGE  
OFFICE OF FINANCIAL AID AND SCHOLARSHIP SERVICES  
500 COLLEGE HILL, CAMPUS BOX 2005  
LIBERTY, MO 64068  
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