Independent

2011-2012 Verification Worksheet

Federal Student Aid Programs

U.S. Department of Education

FORM APPROVED
OMB NO. 1845-0041

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 (and your spouse's, if you are married) 2010 Federal tax forms, or with W-2 forms or other financial documents. 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 or your school may need to make corrections electronically or by using your Student Aid Report (SAR).

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. Your financial aid administrator will help you.

What you should do

1. Collect your (and your spouse's) financial documents (signed Federal income tax forms, W-2 forms, etc.).
2. Talk to your financial aid administrator if you have questions about completing this worksheet.
3. Complete and sign the worksheet.
4. Submit the completed worksheet, tax forms, and any other documents your school requests to your financial aid administrator.
5. Your financial aid administrator will compare information on this worksheet and any supporting documents with the information you submitted on your application. You or your school may need to make corrections electronically or by using your SAR.

A. Student Information

Last name ______ First name ______ M.I. ______ Social Security Number ______

Address (include apt. no.) ______ Date of birth ______

City ______ State ______ ZIP Code ______ Phone number (include area code) ______

B. Family Information

List the people in your household, including:

- yourself, and your spouse if you have one, and
- your children, if you will provide more than half of their support from July 1, 2011 through June 30, 2012, even if they do not live with you, 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, 2011 through June 30, 2012.

Write the names of all household members in the space(s) below. Also write in the name of the college for any household member, excluding your parent(s), who will be attending at least half time between July 1, 2011 and June 30, 2012, 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
Martha Jones (example)	24	Wife	City University
		Self	

C. Student's Tax Forms and Income Information (all applicants) Independent

1. Check only one box below. Tax returns include the 2010 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of your tax return, request a copy from your tax preparer or request an Internal Revenue Service form that lists tax account information.
   - ☐ Check here if you are attaching a signed copy of your tax return.
   - ☐ Check here if a signed tax return will be submitted to the school by ______________________(date).
   - ☐ Check here if you will not file and are not required to file a 2010 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See Question 44 of the Free Application for Federal Student Aid (FAFSA).)

Sources of Untaxed Income	2010 Amount	Sources of Untaxed Income	2010 Amount
a. Child Support	$	d.	$
b. Workman's Compensation	$	e.	$
c. Untaxed Pensions	$	f.	$

3. If you did not file and are not required to file a 2010 Federal income tax return, list below your employer(s) and any income received in 2010 (use the W-2 form or other earnings statements if available).

Sources	2010 Income
	$
	$
	$

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

1. Check only one box below. Tax returns include the 2010 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If your spouse did not keep a copy of the tax return, request a copy from the tax preparer or request an Internal Revenue Service form that lists tax account information.
   - ☐ Check here if you are attaching a signed copy of your and your spouse's joint tax return.
   - ☐ Check here and attach spouse's signed tax return if your spouse filed a separate return.
   - ☐ Check here if a signed spouse's tax return will be submitted to the school by ______________________(date).
   - ☐ Check here if your spouse will not file and is not required to file a 2010 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See Question 44 of the FAFSA.)

Sources of Untaxed Income	2010 Amount	Sources of Untaxed Income	2010 Amount
a. Child Support	$	d.	$
b. Workman's Compensation	$	e.	$
c. Untaxed Pensions	$	f.	$

3. If your spouse did not file and is not required to file a 2010 Federal income tax return, list below your spouse's employer(s) and any income received in 2010 (use the W-2 form or other earnings statements if available).

Sources	2010 Income
	$
	$
	$

E. Additional Financial Information

Student/Spouse

2010 Additional Financial Information

$__________	Education credits (American Opportunity, Hope and Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31.
$__________	Child support **paid** because of divorce or separation or as a result of a legal requirement. **Don't include** support for children in your household. **Please list below names of children these funds were paid for in 2010:** 1) ________ 2) ________ 3) ________ 4)________
$__________	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships
$__________	Taxable student grant and scholarship aid reported to the IRS in your 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. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).
$__________	Earnings from work under a cooperative education program offered by a college.

2010 Untaxed Income

$__________	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 Forms in Boxes 12a through12d, codes D,E,F,G,H, and S.
$__________	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans from IRS Form 1040-total of lines 28+32 or 1040A-line 17.
$__________	Child support **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). **Don't include** the value of on-base military housing or the value of a basic military allowance for housing.
$__________	Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.
$__________	Other untaxed income or benefits not reported elsewhere, such as workers' compensation, disability, etc. Also include the first-time homebuyer tax credit from IRS Form 1040-line 67. **Don't include** student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, 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.
$__________	Money **received**, or paid on your behalf (e.g., bills), not reported elsewhere on this form.

F. Sign this Worksheet

Each person signing this form certifies that all the information reported on it is complete and correct. If married, spouse's signature is optional.

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

____
Student Date

____
Spouse Date

Chart A------For Most People

IF your filing status is …	AND at the end of 2010 you were*…	THEN file a return if your gross income** was at least …
Single	under 65 65 or older	$9,350 10,750
Married filing jointly***	under 65 (both spouses) 65 or older (one spouse) 65 or older (both spouses)	18,700 19,800 20,900
Married filing separately	any age	$3,650
Head of Household	under 65 65 or older	$12,050 13,450
Qualifying widow(er) with dependent child	under 65 65 or older	$15,050 16,150

*If you were born before January 2, 1946, you are considered to be 65 or older at the end of 2010.

****Gross income** means all income you received in the form of money, goods, property, and services that is not exempt from tax, including any income from sources outside the United States (even if you can exclude part or all of it). **Do not** include any social security benefits unless (a) you are married filing a separate return and you lived with your spouse at any time during 2010, or (b) one-half of your Social Security Benefits plus your other Gross Income is more than $25,000 ($32,000 if married filing jointly). If (a) or (b) applies, see the Form 1040 instructions to figure the taxable part of Social Security Benefits you must include in Gross Income.

***If you did not live with your spouse at the end of 2010 (or on the date your spouse died) and your gross income was at least $3,650, you must file a return regardless of your age.