

## 2008-2009 Verification Worksheet (2 Sided Form)

### Federal Student Aid Programs

Your application was selected for review in a process called "Verification." In this process, your school will be comparing 2007 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 information and your financial documents, you may need to send in corrections on your Student Aid Report (SAR) and have a new SAR processed. Try to complete verification as soon as possible, so that your financial aid won't be delayed.

#### What should you do?

1. Collect your (and your parent's or spouse's financial documents- signed Federal Income Tax forms, W-2s, 1099s, etc.)
2. Talk to your financial aid administrator if you have questions about completing this worksheet.
3. Complete this **2-sided worksheet**, then sign and date it.
4. Mail the completed worksheet, tax forms, and any other documentation to your financial aid administrator.
5. Your financial aid administrator will compare information on these documents and make corrections if necessary.

\*\*Your school must review the requested information, under the financial aid program rule (34 CFR, Part 668)\*\*

### **A. Student Information**

Last Name	First	M.I.	Social Security No.
Address (include apt #)		Date of Birth	
City	State	Zip Code	Phone Number (include area code)

### **B. 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, 2008 through June 30, 2009; and (c) any 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.

**Dependent Students:** List the people in your parent(s) household. Include (a) yourself, your parent(s) you live with (include stepparent); (b) your parent(s)' other children, even if they don't live with your parent(s), if (1) your parent(s) provide more than half of their support from July 1, 2008 through June 30, 2009 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 parent(s), and your parent(s) provided 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.

**Write the names, ages, and relationship (to you) of all family members.** Also, write in the name of the college for any household member who will be attending college at least half time between July 1, 2008 and June 30, 2009, and will be enrolled in a degree diploma, or certificate program. **Do not include college information for parent(s).** If you need more space, attach a separate sheet.

Full Name	Age	Relationship	College
Example: Martha Jones	19	self	SMCM

### **C. Sign Worksheet**

By signing this **2-sided** 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, be sentenced to jail or both.

Student's signature	Date	Parent's signature (Dependent Student's only)	Date
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Return completed form to: **St. Mary's College of Maryland, Office of Financial Aid, 18952 East Fisher Rd., St. Mary's City, MD 20686**

**D. Tax Forms and Income Information**

1. All tax filers must submit a **signed** copy of all 2007 Federal Income Tax returns (includes the 1040, 1040A, 1040EZ, tax return from Puerto Rico or a foreign income tax return) and supporting documentation. Check the line for those who filed.

- You                       Your spouse                       Your father / stepfather                       Your mother /stepmother

2. Check the line for those who worked, but did not file and are not required to file a 2007 Federal Income Tax Return. List below your Employer(s) and any income you received in 2007 (submit W-2, 1099, or other earning statements).

- You                       Your spouse                       Your father / stepfather                       Your mother / stepmother

Name of Employer	Student Amount	Spouse or Parent / Stepparent Amount

3. **REPORT ANNUAL AMOUNTS.** Both Tax Filers and Non-Filers must list any untaxed income received in 2006.

**ENTER ZERO FOR EACH LINE WHERE NO FUNDS WERE RECEIVED**

Student (spouse)	Calendar Year 2007	Parent (s)
\$	<u>Earned income credit from IRS Form 1040-line 66a; 1040A-line 40a; or 1040EZ-line 8a.</u>	\$
\$	<u>Additional child tax credit from IRS Form 1040-line 68 or 1040A-line 41.</u>	\$
\$	<u>Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps or subsidized housing.</u>	\$
\$	<u>Social Security benefits received, for all household members as reported in question 90 (or 66 for your parents), that were not taxed (such as SSI). Report benefits paid to parents in the Parents column, and benefits paid directly to student (or spouse) in the Student/Spouse column.</u>	\$
\$	<u>Payments to tax-deferred pension and savings plan (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Box 12a through 12d, codes D, E, F, G, H, and S.</u>	\$
\$	<u>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.</u>	\$
\$	<u>Child support you received for all children. Don't include foster care of adoption payments.</u>	\$
\$	<u>Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b.</u>	\$
\$	<u>Foreign income exclusion from IRS Form 2555-line-45 or 2555EZ-line 18.</u>	\$
\$	<u>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.</u>	\$
\$	<u>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.</u>	\$
\$	<u>Credit for federal tax on special fuels from IRS Form 4136-line 20 (nonfarmers only)</u>	\$
\$	<u>Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).</u>	\$
\$	<u>Veterans' noneducation benefits such as Disability, Death Pension, or Dependency &amp; Indemnity Compensation (DIC), and/or VA Educational Work Study allowances.</u>	\$
\$	<u>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 (FAFSA questions 35 and 79). Don't include 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.</u>	\$
\$	<u>Money received, or paid on your behalf (e.g. bills), not reported elsewhere on this form.</u>	XXXXXXXXXX
\$	<u>Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 or 1040A-line 31.</u>	\$
\$	<u>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 90 (or questions 66 for your parents).</u>	\$
\$	<u>Taxable earnings from need-based employment programs, such as Federal Work Study and need-based employment portions of fellowships and assistantships.</u>	\$
\$	<u>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.</u>	\$