

2012-2013 Verification Worksheet for Federal Student Aid Programs

Your application for Federal Financial Aid was selected for review in a process called "Verification." In this process, your school will be comparing information from your application with 2011 IRS Tax Transcript(s), 2011 W-2 forms, and other financial documents. The law says the school has the right to ask for this information before awarding Federal aid. If there are differences between your application information and your financial documents, your school may need to make corrections electronically by using your Student Aid Report (SAR). *Your school must review the requested information, under the financial aid program rules (34 CFR, Part 668).*

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. **Don't forget to submit copies of your (and your parent's) 2011 Federal IRS Tax Transcripts, and copies of your 2011W-2s. Please note the IRS Tax Transcript is only needed if you did not transfer your 2011 income directly from the IRS to your FAFSA.**

A. Student Information

Last Name		First Name	M.I.	Social Security Number or ID
Address			Date of Birth	
City	State	Zip Code	()	Phone number

B. Family Information

List the people in your PARENT(s) household:

- yourself and your parent(s) (or stepparent) even if you don't live with your parents, and
- your parent's 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, 2012 through June 30, 2013, 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 parents, AND your parents provide more than half of their support AND will continue to provide more than half of their support from July 1, 2012 through June 30, 2013.

You must provide proof of support for these individuals.

Write the names of ALL household members in the space below. Write the name of the college for any household member, except your parent(s), who will be attending college at least halftime for one term between July 1, 2012 and June 30, 2013, 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
Matt Smith (example)	20	Self	ETSU

Return completed and signed form to the ETSU Financial Aid Office

C. Student's Federal Tax Forms and Income Information (all must complete)

1 Check only ONE of the boxes below. Tax returns include the U.S. 2011 Federal Tax Transcript, a tax return from Puerto Rico or a foreign income tax form. Please note the U.S. 2011 Federal Tax Transcript is only needed if you **DID NOT** transfer your 2011 income directly from the IRS website to your 2012-2013 FAFSA.

- Attached are the 2011 IRS Tax Transcript and all W-2 forms.
- A IRS Tax Transcript will be submitted to the school by _____(date).
- You will not file AND are not required to file a 2011 U.S. Federal Income Tax Return. Please complete section 2.
- Transferred my 2011 income directly from the IRS website to the 2012-2013 FAFSA.

2 If you did not file and are not required to file a 2011 U.S. Federal income tax return, complete the following chart. List your employer(s) and any income received in 2011. Use the W-2 form issued by your employer or other earnings statements available.

Source/Employer	2011 Income Amount

3 Attach copies of ALL W-2's received from your employer(s) for 2011 income earned.

D. Parent(s) Tax Forms and Income Information

1 Check only ONE of the boxes below. Tax returns include the U.S. 2011 Federal Tax Transcript, a tax return from Puerto Rico or a foreign income tax form. Please note the U.S. 2011 Federal Tax Transcript is only needed if you **DID NOT** transfer your 2011 income directly from the IRS website to the 2012-2013 FAFSA.

- Attached are parent(s) 2011 IRS Tax Transcript and all W-2 forms.
- A copy parent(s) IRS Tax Transcript will be submitted to the school by _____(date).
- Your parent will not file AND is not required to file a 2011 U.S. Federal Income Tax Return. Please complete section 2.
- Transferred 2011 income directly from the IRS website to the 2012-2013 FAFSA.

2 If your parent did not file and is not required to file a 2011 U.S. Federal income tax return, complete the following chart. List your parent's employer(s) and any income received in 2011. Use the W-2 form issued by their employer or other earnings statements available.

Source/Employer	2011 Income Amount

3 Attach copies of ALL W-2's received from the employer(s) for 2011 income earned.

E. All applicants must complete Untaxed Income for 2011

Complete each blank of these worksheets. Enter '0' where applicable.

Student	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 - line 28 + line 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 - 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' noneducational benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances	
\$ _____	\$ _____
Other untaxed income not reported - Workers' compensation, disability, first-time homebuyer tax credit from line 67 on IRS Form 1040. Do not include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, 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, not reported elsewhere on this form (i.e. money, gifts, and loans, plus housing, food, clothing, car payments or expenses, medical and dental care, and college costs)	
\$ _____	\$ XXXXXX

F. Additional Financial Information for year 2011

Student	Parents
\$ _____	\$ _____
Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Combat pay reported on the W-2 in Box 12, code Q is untaxed. Do Not enter untaxed combat pay.	
\$ _____	\$ _____
Earnings from work under a cooperative education program offered by a college.	
\$ _____	\$ _____

Complete each blank of these worksheets. Enter '0' where applicable.

F. Additional Financial Information for year 2011 - Continued

Student	Parents	
\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 - line 49; 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. List children child support paid for; List who paid the support; List name of person paid to: _____ _____	\$
\$	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 or assistantships	\$

G. Asset Information (all applicants must complete)

Complete each blank of these worksheets. Enter '0' where applicable.

Student	Parents	
\$	As of the day you completed your FAFSA, what was the total balance of cash, savings, and check accounts. (Do not include student financial aid)	\$
\$	As of the day you completed your FAFSA, what was the net worth of investments, including real estate. Net worth means current value minus debt. Investments INCLUDE real estate, trust funds, money market funds, mutual funds, certificates of deposits, stocks, stock options, bonds, other securities. Coverdell savings accounts, college savings plans, installment and land sale contracts (including mortgages held), commodities, etc. Investment value includes the market value of these investments as of today. Investment debt means only those debts that are related to the investments. Investments DO NOT include the home you live in, the value of life insurance, retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc) and prepaid tuition plans, or cash savings, and checking accounts already reported above.	\$
\$	As of the day you completed your FAFSA, what was the net worth of current businesses and/or investment farms. Do not include a farm that your or your parents live on and operate.	\$

H. Signatures

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

By signing this worksheet, I (we) certify that all information reported on it is complete and correct.

Student		Date
Parent	At least ONE parent must sign	Date