

# 2009-2010 Verification Worksheet

## Federal Student Aid Programs

Independent

In this verification process, we will be comparing information from your financial aid application with signed copies of your and your spouse's (for students who are married) or your parent(s)' (for dependent students) 2008 federal income tax returns, schedules, and W-2 forms or other financial documents. By law, we have the right to ask you for this information before awarding federal aid. We must review the requested information under the federal financial aid program rules (CFR Title 34, Part 668). If there are differences between your application information and the verification documents, we will make the corrections and send the required changes electronically to the federal student aid processor, to have your information reprocessed.

### What you should do

1. Collect signed copies of your and your spouse's 2008 federal income tax returns, schedules, and W-2 forms. If you need to request a copy of your tax return, call the IRS at 1-800-829-1040.
2. Read the instructions carefully and complete and sign this form. Do not leave questions blank.
3. Mail this completed form and any other documents that we have requested to The College Board Institutional Documentation Service (IDOC) with the IDOC Cover Sheet. You will receive the Cover Sheet with instructions and the mailing address after February 3, 2009. For a duplicate Cover Sheet after that date, go to <https://idoc.collegeboard.com> or call 954-622-1484.

### 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, 2009 through June 30, 2010, 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, 2009 through June 30, 2010.

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, 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.

Full Name	Age	Relationship	College
<i>Martha Jones</i> (example)	<i>24</i>	<i>Wife</i>	<i>City University</i>
		Self	

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

1. Check only one box below. Tax returns include the 2008 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 2008 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See Question 47 of the Free Application for Federal Student Aid (FAFSA).)

Sources of Untaxed Income	2008 Amount	Sources of Untaxed Income	2008 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 2008 Federal income tax return, list below your employer(s) and any income received in 2008 (use the W-2 form or other earnings statements if available).

Sources	2008 Income
	\$
	\$
	\$

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

1. Check only one box below. Tax returns include the 2008 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 2008 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See Question 47 of the FAFSA)

Sources of Untaxed Income	2008 Amount	Sources of Untaxed Income	2008 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 2008 Federal income tax return, list below your spouse's employer(s) and any income received in 2008 (use the W-2 form or other earnings statements if available).

Sources	2008 Income
	\$
	\$
	\$

**E. 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, be sentenced to jail, or both.**

\_\_\_\_\_  
Student Date

\_\_\_\_\_  
Spouse Date

*Do not mail this worksheet to the Department of Education. Submit this worksheet to the College Board's Institutional Documentation Services (IDOC). Make sure that tax forms are signed.*