

2009-2010 Verification Instructions

Your application was selected for review in a process called Verification. In this process, we will be comparing information from your application with signed copies of 2008 Federal tax returns and other requested financial documents. We are required to ask you for this information before awarding Federal aid. *If there are differences between your application information and your financial documents we may ask you for additional documentation and corrections will be required before further processing can take place.*

Complete and return the attached verification form along with copies of all 2008 W-2's and your signed 2008 Federal Tax return and your parent(s)' if you are dependent. Once you have completed and signed this form, return it to the address listed above.

Section A Instructions: Check yes or no to each of the seven questions listed in Section A.

Section B Instructions: Please complete the chart in Section B based on your answers in Section A. If you answered "NO" to every part of Section A, you are a dependent student for financial aid purposes. If you answered "YES" to any question in Section A, you are considered an independent student for financial aid purposes.

Dependent students: List the people in your parents' household. Include:

- Yourself and your parent(s) or stepparent even if you don't live with your parents, and
- Your parents' other children if they provide more than half of their support from July 1, 2009 through June 30, 2010
- 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, 2009 through June 30, 2010. Be prepared to provide documentation of this support if requested by the Financial Aid Office.

Independent students: List the people in your household. 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.
- 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. Be prepared to provide documentation of this support if requested by the Financial Aid Office.

Section C Instructions. Tax filers.

Dependent student: Submit non-returnable, signed copies of student and parent/stepparent 2008 Federal Income Tax Return(s) and all 2008 W-2s. If your parents/stepparents are married but filed separately, attach both 2008 Federal Income Tax Returns. See page 2 of Verification Instructions for information on acceptable tax documents.

Independent student: Submit non-returnable, signed copies of student and spouse (if married) 2008 Federal Income Tax Return(s) and all 2008 W-2s. If you are married and you and your spouse filed separately, sign and attach a copy of both Federal Income Tax Returns. See page 2 of Verification Instructions for information on acceptable tax documents.

Section D Instructions. Non-Tax Filers. This section should be completed *only if you will not* be submitting tax returns.

Section E Instructions. All students should respond to all items in Section E. If an item is not applicable, write NA or zero. Please do not leave blanks.

Section F Instructions. All parents should respond to all items in Section F if the student is dependent.

Section G. Instructions. All students must sign the verification form. If a student is dependent we must have the signature of one parent.

What You Can Submit for Federal Income Tax Returns

Form 1040, U.S. Individual Income Tax Return, 2008. The form includes sections for Label, Filing Status, Exemptions, Income, Adjusted Gross Income, and Total Tax. It is a standard individual income tax return form.

1040 (both front and back)

Form 1040EZ, U.S. Individual Income Tax Return for Single and Joint Filers With No Dependents, 2008. This is a simplified version of the 1040 form, designed for taxpayers with no dependents and no itemized deductions.

(1040EZ both front and back)

Form 1040A, U.S. Individual Income Tax Return, 2008. This form is for taxpayers who have itemized deductions or dependents but do not have other income requiring the full 1040 form.

(1040EZ)

Form W-2, Wage and Tax Statement, 2008. This form is used by employers to report an employee's earnings and the taxes withheld during the year. It includes fields for employer information, employee information, wages, and various taxes.

Example of 2008 W-2

Other Acceptable Federal Income Tax Return Documents

In addition to the forms shown above, you can also submit one of the following:

- **Tax Transcript** – A tax transcript/print out is FREE and may be ordered to be sent to you at your address of record by calling (800) 829-1040 or by completing and mailing IRS Form 4506-T: Request for Transcript of Tax Return. When obtaining a copy of your return by phone, request “**Form 1722**”. The tax return transcript shows most line items contained on the return as it was originally filed, including any accompanying forms and schedules. **Your signature is required on the tax transcript.**
- **Electronic Filing (E-File)** – The e-file provider (a tax return preparer such as H.R. Block, Jackson Hewitt Tax Service, etc.) prints out a copy in their own format. Returns in the e-file provider’s format might not contain every line item, showing instead only the date the tax filer provided. When an electronic tax return is filed, an IRS Form 8453 is also submitted. Form 8453 does not have enough information and is not an acceptable tax document for financial aid purposes. **The E-File is an acceptable document as long as your signature is on the form.**
- **TeleFile** – TeleFile returns are acceptable documentation only when they have been signed and include the 10-digit IRS confirmation number in Line N. The TeleFile does not have a signature line. Please sign at the bottom of the form.

IMPORTANT: If you filed an amended 1040/1040A, you must submit the amended return along with a copy of your original Federal Income Tax Return. Any tax return submitted to us without the appropriate signatures will be returned as unacceptable documentation.



2009-2010 Verification Form

Student's Name _____ ID# _____

Date of Birth _____

Section A. Student Status

Check One
YES NO

- | | | |
|--|-------|-------|
| 1. Were you born before January 1, 1986? | _____ | _____ |
| 2. As of today, are you married? (Answer 'yes' if separated but not divorced) | _____ | _____ |
| 3. At the beginning of the 2009-2010 school year , will you be working on a master's or doctorate program (such as MA, MBA, MD, JD, PhD, EdD, or graduate degree, etc.)? | _____ | _____ |
| 4. Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?* | _____ | _____ |
| 5. Are you a veteran of the U.S. Armed Forces?*** | _____ | _____ |
| 6. Do you have children who will receive more than half of their support from you between July 1, 2009, and June 30, 2010? | _____ | _____ |
| 7. Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their financial support from you, now and through June 30, 2010? | _____ | _____ |
| 8. At any time since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court? | _____ | _____ |
| 9. Are you or were you an emancipated minor as determined by a court in your state of legal residence? | _____ | _____ |
| 10. Are you or were you in legal guardianship as determined by a court in your state of legal residence? | _____ | _____ |
| 11. 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? | _____ | _____ |
| 12. At any time on or after July 1, 2008, did the director of an emergency shelter program funded by the U.S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless? | _____ | _____ |
| 13. 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? | _____ | _____ |

*4. Answer "Yes" if you are currently serving in the U.S. Armed Forces or are a National Guard or Reserves enlistee who is on active duty for other than state or training purposes.
***5. Answer "No" if you are a National Guard or Reserves enlistee who is on active duty for state or training purposes.

Section B. Household Information – See page 1 of the attached instructions for information on how to complete the chart below.

Dependent Students Only: Indicate your parents' marital status.

- Married
- Separated
- Unmarried (single, divorced, widowed)

All Students: Write the names of *all* household members in the chart below. Write your name and age on line 1. Also, write in the name of the college for any household member 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.

FULL NAME	AGE	RELATIONSHIP	COLLEGE
1.		SELF	DSC
2.			
3.			
4.			
5.			
6.			

Section C. Tax filers. See the attached instructions for information on the federal tax documents to be submitted. If student or parent reported *business income on line 12 of the 1040*, please answer the following question: If your business is family-owned, list the number of full-time employees employed: _____
List one employee if you report business income only because you are a contract laborer.

Section D. Non-filers. If a 2008 US Income Tax was not and/or will not be filed by you, your spouse, and/or your parents, please complete the appropriate section below and attach copies of all 2008 W-2s.

Check only if a tax return for 2008 will not be filed
 _____ I, the student (or spouse), received no 2008 W-2s.
 _____ I, the student (or spouse), did not and will not file a 2008 Federal Income Tax Return.

<u>2008 Income sources</u>	<u>Amount</u>
_____	\$ _____
_____	\$ _____

Section E. Student

Respond to all items below. If an item is not applicable, write NA or Zero. Please do not leave blanks.

How much of the total income reported on your 2008 Federal Income Tax Return was from the Federal Work Study Program or scholarships? Do not include assistantships. \$ _____

How much child support did you pay in 2008? \$ _____
 Name of the child(ren) that you paid support for.

Non-taxable income and benefits received during 2008. Do not include financial aid.

Child Support Received
 \$ _____/month X _____ months = \$ _____

Other untaxed income not listed above. Examples include VA non-educational benefits and voluntary, pre-tax payments to 401k and 403b retirement plans (from Box 12 of W-2)

<u>Type</u>	<u>2008 Annual Amount</u>
_____	_____
_____	_____

Check only if a tax return for 2008 will not be filed
 _____ I, the parent(s)/ stepparent, received no 2008 W-2s.
 _____ I, the parent(s)/stepparent did not and will not file a 2008 Federal Income Tax Return.

<u>2008 Income sources</u>	<u>Amount</u>
_____	\$ _____
_____	\$ _____

Section F. Parent(s)/ Stepparent

Respond to all items below. If an item is not applicable, write NA or Zero. Please do not leave blanks.

How much of the total income reported on your 2008 Federal Income Tax Return was from the Federal Work Study Program or scholarships? Do not include assistantships. \$ _____

How much child support did you pay in 2008? \$ _____
 Name of the child(ren) that you paid support for.

Non-taxable income and benefits received during 2008. Do not include financial aid.

Child Support Received
 \$ _____/month X _____ months = \$ _____

Other untaxed income not listed above. Examples include VA non-educational benefits and voluntary, pre-tax payments to 401k and 403b retirement plans (from Box 12 of W-2)

<u>Type</u>	<u>2008 Annual Amount</u>
_____	_____
_____	_____

Section G. Certification: Signature Required Below

If you answered YES to any question in Section A, a parent's signature is not required. I (we) certify by my (our) signature(s) below that all of the information reported to qualify for federal financial aid is complete and correct.

 Student Signature Date

 Parent Signature Date

 Student Daytime Phone Number

 Parent Daytime Phone Number