

# 2009-2010 Verification Worksheet Federal Student Aid Programs



Your FAFSA application was selected for review in a process called "Verification." In this process, we are required to compare information from your FAFSA application with **SIGNED** copies of your and your parent(s)' 2008 federal tax forms AND 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, we may need to send corrections electronically to have your information reprocessed.

## What you should do

- Collect your and your parent(s)' financial documents (signed 2008 federal income tax forms, W-2 forms, etc.)
- Complete this worksheet. **ALL SECTIONS MUST BE FILLED IN.** Write N/A (not applicable) or enter a zero if the field does not pertain to you. You and at least one parent **MUST** sign the worksheet.
- Send or take the completed worksheet, plus copies of your and your parent(s)' signed 2008 federal tax forms and 2008 W-2 forms to the Financial Aid Office at Wartburg College.

*We must review the requested information under the financial aid program rules (CFR Title 34, Part 668).*

## A. Student Information

<i>Last name</i>	<i>First name</i>	<i>M.I.</i>	<i>Social Security number</i>
<i>Address (include apt. no.)</i>			<i>Date of birth</i>
<i>City</i>	<i>State</i>	<i>Zip</i>	<i>Phone number (include area code)</i>

## B. Family Information *(verifying number in household and number in college)*

Write the names of the people in the household where you live. Also write in the name of the college where any family member, excluding your parent(s), will be enrolled at least half-time in a degree or certificate program between July 1, 2009, and June 30, 2010. If you need more space, attach a separate page.

- Yourself on the **first** line
- Your parent(s)
- Your parents' other children if (a) your parent(s) provide **more than half** of their support 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 parent(s) and your parent(s) 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.

Full Name	Age	Year of Birth	Relationship	College attending in 2009-10
			Self	

## C. Student's 2008 Income Information

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 tax transcript by calling 1-800-829-1040.

- Check here if you are attaching a signed copy of your federal tax return and W-2 forms.
- Check here if a signed federal tax return and W-2 forms 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. 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 statement if available).

Sources	2008 Income

## D. Parent(s)' 2008 Income Information

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 tax transcript by calling 1-800-829-1040.

- Check here if you are attaching a signed copy of your parents' federal tax return(s) and W-2 forms.  
 Check here if a signed federal tax return(s) and W-2 forms will be submitted to the school by \_\_\_\_\_ (date).  
 Check here if your parent(s) will not file and are not required to file a 2008 U.S. Income Tax Return.

2. If your parent(s) did not file and are not required to file a 2008 federal income tax return, list below your parent(s)' employer(s) and any income they received in 2008 (use the W-2 form or other earnings statement if available).

Sources	2008 Income

## E. 2008 Additional Financial Information *FAFSA questions 46a-46e for students; 94a-94e for parents*

Student	Calendar Year 2008	Parent(s)
\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 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.	\$
\$	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 adjusted gross income. Includes Americorps benefits (awards, living allowances and interest accrual payments), as well as grant and 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. Combat pay is reported on the W-2 in Box 12, Code Q.	\$
\$	TOTAL	\$

## F. 2008 Untaxed Income *FAFSA questions 47a-47j for students; 95a-95i for parents*

Student	Calendar Year 2008	Parent(s)
\$	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-total of lines 28 + 32 or 1040A-line 17	\$
\$	Child support <b>received</b> 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)	\$
\$	Veterans' noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances	\$
\$	Other untaxed income not reported, such as workers' compensation, disability, etc. <b>Don't include</b> student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Workforce Investment Act educational benefits, 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 <b>received</b> , or any money paid on your behalf (e.g., bills), not reported elsewhere on this form	XXXXXXXXXX
\$	TOTAL	\$

## G. Sign This Worksheet

By signing this worksheet, I (we) certify that all the information reported to qualify for federal student aid is complete and correct. The student and at least one parent must sign.

Student \_\_\_\_\_

Date \_\_\_\_\_

Parent \_\_\_\_\_

Date \_\_\_\_\_

Wartburg College Financial Aid Office • 100 Wartburg Blvd. • P.O. Box 1003 • Waverly, IA 50677-0903  
 Phone: 319-352-8262 • Fax: 319-352-8247 • www.wartburg.edu

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