



Office of Student Financial Aid
2400 Gillionville Road.
Albany, GA 31707
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2008 – 2009 INDEPENDENT VERIFICATION FORM INSTRUCTIONS

Your FAFSA application has been selected for a process called “Verification”. In this process, we will be comparing information from your application with your (and spouse’s if married) 2007 federal tax return and household information that is requested on the verification form. During this process if there is conflicting data, additional documentation will be required to obtain an accurate calculation.

PLEASE READ AND FOLLOW THESE INSTRUCTIONS TO COMPLETE THE ATTACHED VERIFICATION FORM.

Failure to answer each question will delay the process of your application and may result in loss of institutional funding.

SECTION A - 2007 INCOME TAX INFORMATION

You must provide your (and spouse’s if married) 2007 federal income tax returns. Acceptable forms include a **signed copy of the original**: 1040, 1040A, or 1040EZ submitted to the IRS. **Form 8453 is not acceptable.** **During this process you may be required to submit a confirmation or statement from IRS and/or an amended tax return should it be determined that there is conflicting data with what you have submitted.**

Financial aid administrators (FAA’s) must have a fundamental understanding of relevant tax issues that can considerably affect the need analysis. Because conflicting data often involves such information, FAA’s are obligated to know: whether a person was required to file a tax return, what the correct filing status for a person should be, and that an individual cannot be claimed as an exemption by more than one person or claim a person that they have not supported. For example, a FAA noticing that a Independent student’s married parents have each filed as “head of household” (which offers a greater tax deduction then filing as single or married) might question whether that is the correct filing status. Visit www.irs.gov for Publication 17 of the IRS, *Your Federal Income Tax*, describes on p. 25 the requirements that a person must meet to file as head of household. “An amended tax return may be required before you can be awarded aid”

Marital Status: Please check the appropriate box for your status as of this day and give date of this status. (i.e.; if married give wedding date; divorced, give date of the final decree). **If you are married at the time the FAFSA is completed you must include your spouse’s income tax information.**

SECTION B – HOUSEHOLD MEMBERS AND WHO WILL BE IN COLLEGE

List the people in your household include (a) yourself, (b) your spouse if married; (c) your children (biological and step-children only if you will provide more than half of their support from July 1, 2008 through June 30, 2009; and (d) any other people if they now live with you, and only if 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. Do not include those who live in your household that work and provide for themselves or receive social security or disability unless you provide more than their benefits provide.. **(Adequate documents may be required i.e. legal guardianship, proof of foster care, income tax forms or 1099).**

Who will be in college:

Write in the name of the college for any family member listed in household who will be attending college at least half-time (6 hours per semester or quarter) between July 1, 2008 and June 30, 2009 **and** will be enrolled in a degree seeking undergraduate program. Confirmation will be required.

SECTION C - WORKSHEETS

Worksheets must be completed by student (and spouse if married). If the answer to a question is zero, write zero in the space provided, otherwise the Verification Form will be returned to you. Question regarding Social Security must include benefits for all family members in household size. This form will be returned if this is left blank. Divorce decree may be required. Question regarding grants and scholarships is only applicable if reported on your 2007 federal tax forms.

SECTION D - SIGNATURES

Student signature is required.

Have you followed the instruction sheet for completing the verification form? Please use the checklist below to make sure it is completed properly; failure to do so will cause the form to be returned to you and will delay the process and may result in loss of institutional funding.

Checklist:

- 1) Go over entire verification form; is every question answered? _____
- 2) Did you indicate the type of tax form filed? If filed, please enclose a signed copy with this form _____
- 3) Was there untaxed income? Be sure to report this amount in Section C. _____
- 4) Did you list yourself, your spouse if married and any other person that you will support in household size? _____
- 5) Did you answer each question in Section C worksheets? You must do so even if it is zero. _____
- 6) Did you sign the Verification Form? Application will be returned if not. _____



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**INDEPENDENT VERIFICATION FORM
 2008 -2009**

NAME: _____ SS/School ID#: _____

ADDRESS: _____ CITY: _____ STATE: _____ ZIP: _____

HOME PHONE: _____ CELL: _____ EMAIL: _____

SECTION A - 2007 INCOME TAX INFORMATION: Please follow instruction sheet

You are required to submit signed copies of 2007 Federal Tax Returns for student (and spouse if applicable).

Please mark all questions below with an (X) that applies to you and your spouse, if married

STUDENT TAX INFORMATION

2007 taxes filed and attached _____
 Worked but 2007 tax will not be filed _____ (W-2's required)
 Will not file 2007 tax _____

SPOUSE'S TAX INFORMATION

2007 taxes filed and attached _____
 Worked but 2007 tax will not be filed _____ (W-2's required)
 Will not file 2007 tax _____ (Confirmation may be required from IRS)

OTHER UNTAXED INCOME RECEIVED:

Disability _____
 Workers Comp _____
 Social Security _____
 Other untaxed _____
 (Report amount in worksheets)

STUDENT'S MARITAL STATUS AS OF THIS DAY:

Single _____ give date of this status: _____
 Married _____
 Separated _____
 Divorce _____
 Widowed _____

SECTION B – HOUSEHOLD MEMBERS AND WHO WILL BE IN COLLEGE: Please follow instruction sheet

List members of household	Age	DOB	Relationship to Student	If this person will attend College half time or more in 2008-2009, list the name of the college
			Student	Darton College

SECTION C – WORKSHEETS: Please follow instruction sheet

WORKSHEET A (Report Annual Amount)

Answer each question, if amount is zero write in zero

Student		Spouse
\$	Earned income credit from IRS Form 1040–line 66a, 1040A-line 40a or 1040EZ-line 8a	\$
\$	Additional child tax credit from IRS Form 1040-line 68 or 1040A-line 41	\$
\$	Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't Include food stamps or subsidized housing	\$
\$	Social Security benefits received, <u>for all household members</u> that were not taxed. (such as SSI). Report benefits paid to parents in the parent's column, and benefits paid directly to the student in the student column.	\$

WORKSHEET B (Report Annual Amounts)

Answer each question, if amount is zero write in zero

Student		Spouse
\$	Payments to tax-deferred pension and savings plans 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 – add lines 28 + 32 or 1040A-line 17	\$
\$	Child support you received <u>for all children</u> . (Don't include foster care or adoption payments).	\$
\$	Tax exempt interest income from IRS 1040 or 1040A-line 8b	\$
\$	Foreign income exclusion from IRS For 2555-line 43 or 2555EZ-line 18	\$
\$	Untaxed portions of IRA distributions from IRS Form 1040 lines (15a minus 15b) or 1040A (11a minus 11b). Exclude rollovers. If negative, enter a zero here.	\$
\$	Credit for federal tax on special fuels from IRS Form 4136 – line 15 - - (non-farmers only)	\$
\$	Housing, food, and other living allowances paid to members of the <u>military, clergy and others</u> (including cash payments and cash value of benefits).	\$
\$	Veteran's non-education benefits such as Disability, Death Pension, Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances	\$
\$	Other untaxed income not reported elsewhere on Worksheets A & B (e.g. workers compensation, untaxed portions of railroad retirement benefits, Black Lung benefits, disability, combat pay not reported on the tax return, etc.) Don't include student aid, Workforce investment Act educational benefits, non-tax filers combat pay, or benefits from flexible spending arrangements, e.g. cafeteria plans	\$
\$	Money received or paid on your behalf (e.g. bills by family, friends or churches) not reported elsewhere on this form	\$

WORKSEET C (Report Annual Amounts)

Answer each question, if amount is zero write in zero

Student		Spouse
\$	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. Documentation may be required!	\$
\$	Taxable earning 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 parent's) adjusted gross income. Includes Americorp benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	\$

SECTION D – SIGNATURES REQUIRED

I(we) have read and completed this verification worksheet based on the instruction sheet and certify that all of the information provided on this form is accurate.

Student's Signature _____ Date _____

Spouse's Signature _____ Date _____

Warning: if you purposely give false or misleading information on this form, you may be fined, be sentenced to jail, or both