



Office of Student Financial Aid
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2011 – 2012 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) 2010 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 2010 Income Tax Information

You must provide your (and spouse’s if married) 2010 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 (2010) of the IRS, *Your Federal Income Tax*, describes in part 1, section 2, 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. **In order to claim separated under marital status, you will be required to submit verifying documentation.**

SECTION B – Household Family Information

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, 2011 through June 30, 2012; 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, 2011 through June 30, 2012. 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 size (**excluding parents**) who will be attending college at least half-time (6 hours per semester or quarter) between July 1, 2011 and June 30, 2012 **and** will be enrolled in a degree seeking undergraduate program. Confirmation will be required.

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 2010 federal tax forms.

SECTION C - 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 on the worksheet. _____
- 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 on the worksheets? You must do so even if it is zero. _____
- 6) Did you sign the Verification Form? Application will be returned if not. _____

Enter amounts for you and your spouse.

If the answer is zero or the question does not apply, enter 0.

Spouse's(44)		2010 Additional Financial Information	Student's (44)
\$	a.	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A- line 31.	\$
\$	b.	Child support 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, as reported in question 94..	\$
\$	c.	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
\$	d.	Grant and scholarship aid reported to the IRS in the adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$
\$	e.	Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$
\$	f.	Earnings from work under cooperative education program offered by a college	\$
Spouses' (45)		2010 Untaxed Income	Student's (45)
\$	a.	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 forms in Boxes 12a through 12d, codes D, E, F, G, H, and S.	\$
\$	b.	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS form 1040-line 28 + line 32 or 1040A-line 17.	\$
\$	c.	Child support received for any of your children Don't include foster care or adoption payments.	\$
\$	d.	Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b.	\$
\$	e.	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.	\$
\$	f.	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.	\$
\$	g.	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.	\$
\$	h.	Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
\$	i.	Other untaxed income not reported in items 45a through 45h, such as workers' compensation, disability, etc. Don't include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, 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.	\$
\$	j.	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$

SECTION C – 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