



2009-2010 Verification Worksheet Federal Student Aid Programs

Independent Students

Your application was selected for review in a process called "Verification." In this process, your school must compare information from your application with signed copies of your and your spouse's 2008 federal tax forms, W-2's and/or other 2008 financial documents. Federal regulations say we have the right and responsibility to require this information before awarding Federal aid. If there are differences between your application and your other documents, corrections may need to be submitted to the Department of Education. Please answer carefully and completely.

What you should do?

1. Collect your and your spouse's financial documents (signed Federal income tax forms, W-2 forms, etc.).
2. Complete and sign the worksheet---you and your spouse.
3. Submit the completed worksheet, tax forms, and any other documents your school requests to your financial aid administrator.

Section A: Student Information

Name (Last, First M.I)

Social Security Number

Address (include apt. #)

Date of Birth

City, State, Zip Code

Phone (include area code)

Section B: Family Information

List the people in your household. You may only 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, and (*supporting documentation may be required*)
- other people if they now live with you, and you provide more than half their support and will continue to provide more than half of their support from July 1, 2009 through June 30, 2010. (*supporting documentation is required*)

Write the names of only those household members meeting definition above. *You may not include roommates.* Indicate the name of the college for any household members, excluding your parent(s), who will be attending college 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.

Full Name (include your maiden name)	Age	Relationship	Name of College
		Self	Southern Miss

Section C: Tax Filer Status

TAX FILERS

- If you and/or your spouse filed 2008 federal taxes, you must submit signed copies of 2008 Federal Income Tax returns.
- Acceptable tax documents include 2008 IRS Forms 1040, 1040A, 1040EZ, tax transcript, a tax return from Puerto Rico or a foreign country. *All documentation must be signed. Do not provide us with any originals.*
- **We cannot accept IRS Form 8453 as it does not provide sufficient information for verification.**
- **Please complete page 2 section D and worksheet A, B, C to verify all sources of income.**

NON-TAX FILERS (check all appropriate boxes)

- Check here if you will not file and are not required to file a 2008 U.S. Income Tax Return.
- Check here if your spouse will not file and are not required to file a 2008 U.S. Income Tax Return.

o **You MUST complete page 2 section D.**

Section D: Untaxed and Other Source of Income

If you or your spouse did not file and are required to file a 2008 federal income tax return, list below your employer(s) and any income received in 2008 (use W-2 forms or other earnings statements if available).

Name of Employer	Student Amount	Spouse Amount

Please complete all items below, and submit copies of 2008 federal tax form if you have not already done so. Documentation of benefits, including denial or ineligibility for benefits, may be requested after review of the information you provide.

Student/Spouse	Additional income:
\$	Education credits (Hope and Lifetime Learning tax credits) from the IRS Form 1040 (line 50) or 1040a (line 31). (2008 federal taxes.)
\$	Child support you paid because of divorce or separation, or as the result of a legal requirement. Don't include support for children in your (or your parents') household as reported on your FAFSA application.
\$	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. (2008 W2 forms)
= \$	Total columns—answer must be provided (may not leave items blank) enter zero if item does not apply to you. Further documentation may be requested.

Student/Spouse	Untaxed Income:
\$	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. (2008 W2 forms)
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040, line 28 + line 32, or 1040A, line 17. (2008 federal taxes)
\$	Child support received 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. (2008 federal taxes)
\$	Untaxed portions of IRA distributions from the IRS Form 1040-lines (15a minus 15b) or 1040A-lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here. (2008 federal taxes)
\$	Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A-lines (12a minus 12b). Excludes rollovers. If negative, enter a zero here. (2008 federal taxes)
\$	Housing, food and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits.)
\$	Veteran's non education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
\$	Any other untaxed income or benefits not reported elsewhere, such as worker's compensation, disability, etc. Don't include student aid, 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 received, or paid on your behalf (e.g. bills), not reported elsewhere on this form.
= \$	Total columns—answer must be provided (may not leave items blank) enter zero if item does not apply to you. Further documentation may be requested.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, prosecuted for fraud, sentence to jail, and/or face other charges, and will have to repay any financial aid funds you received

By signing this worksheet, I (we) certify that all information reported to qualify for student financial aid is complete and correct, and I (we) attached all documentation as required to this statement.

Student Signature _____

Date _____

Spouse Signature (optional) _____

Date _____