



2007-2008 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 2006 federal tax forms, W-2's and/or other 2006 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, 2007 through June 30, 2008, 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, 2007 through June 30, 2008. (*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, 2007 and June 30, 2008. 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 2006 federal taxes, you must submit signed copies of 2006 Federal Income Tax returns.
- Acceptable tax documents include 2006 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 2006 U.S. Income Tax Return.
- Check here if your spouse will not file and are not required to file a 2006 U.S. Income Tax Return.
- You MUST complete page 2 section D and worksheet A, B, C to verify all sources of income.**

D. Untaxed and Other Sources of Income

If you or your spouse did not file and are not required to file a 2006 Federal income tax return, list below your employer(s) and any income received in 2006 (use the W-2 form or other earnings statements if available.)

Name of Employer	Student Amount	Spouse Amount

Please complete all sections and items below, and **submit copies of 2006 federal tax forms if you have not already done so.**
Student/Spouse Documentation of benefits, including denial or ineligibility for benefits, may be requested after review of the information you provide.

Worksheet A - untaxed income	
\$	Earned income credit from IRS Form 1040 (line 66a); 1040A (line 41a); 1040EZ (line 8a). (2006 federal taxes)
\$	Additional child tax credit from IRS Form 1040 (line 68); 1040A (line 42). (2006 federal taxes)
\$	Welfare benefits or public assistance, including Temporary Assistance for Needy Families (TANF). Do not include food stamps or subsidized housing. (Documentation of total 2006 benefits received)
\$	Social Security benefits received that were not taxed (such as SSI). (2006 year end statement of benefits received)
= \$	Total A – answer must be provided (may not leave items blank) — if no items in Worksheet A apply to you (and your spouse), enter zeros, and total to the left. Documentation (in bold) may be requested.
Worksheet B - untaxed income	
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including but not limited to, amounts reported on W2 form in boxes 12a-d, codes D, E, F, G, H, and S. (2006 W2 forms, other statements of payment)
\$	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh or other qualified plans from IRS Form 1040 (lines 28+32), or 1040A (17) (2006 federal taxes)
\$	Child support received for all children. Do not include foster care or adoption payments.
\$	Tax exempt interest income from IRS Form 1040 (line 8b) or 1040A (line 8b). (2006 federal taxes)
\$	Foreign income exclusion from IRS Form 2555 -line 43 or 2555EZ -line 18
\$	Untaxed portions of IRA distributions from IRS Form 1040-lines (15a minus 15b) or 1040A-lines (11a minus 11b). <u>Exclude rollovers.</u> (2006 federal taxes)
\$	Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A- lines (12a minus 12b). <u>Exclude rollovers.</u> If negative, enter a zero here. (2006 federal taxes)
\$	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 military, clergy, and others (including cash payments and cash value of benefits)
\$	Veterans' 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 benefit not reported elsewhere on Worksheets A and B, such as worker's compensation, disability , untaxed portions of railroad retirement benefits, or Black Lung benefits. Do not include student aid, WIA/JTPA educational benefits, nor benefits from flexible spending arrangements (cafeteria, medical, childcare plans). (2006 end of year statement of benefit(s) received)
\$	Cash received, or any money paid on your behalf (i.e. bills paid for you), not reported elsewhere on this form.
= \$	Total B – answer must be provided (may not leave items blank) — if no items in Worksheet B apply to you (and your spouse), enter zeros, and total to the left. Documentation (in bold) may be requested.
Worksheet C - income exclusions	
\$	Education credits - Hope/Lifetime Learning tax credits from IRS 1040 (line 50) or 1040A (line 31) (2006 federal taxes)
\$	Child support paid because of divorce or separation. Do not include support for children in your (or your parents') household as reported on your FAFSA application.
\$	Taxable earnings from federal Work-Study or other need-based work program; only may include here if included as income on your 2006 taxes. (2006 federal taxes)
\$	Student grant, scholarship, fellowship, or assistantship aid, including Ameri-Corps awards, as reported to the IRS in your adjusted gross income. (2006 federal taxes and school's end of year statement of qualifying amounts/1098)
= \$	Total C – answer must be provided (may not leave items blank) — if no items in Worksheet C apply to you (and your spouse), enter zeros, and total to the left. Documentation (in bold) may be requested.

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

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 _____