2008-2009 Verification Worksheet — Independent

Federal Student Aid Programs

Your application was selected for review in a process called verification. In this process, we will be comparing information from your application with signed copies of your and your spouse's 2007 Federal tax forms with W-2 forms or other financial documents. The law states that the College has 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 submit corrections on your Student Aid Report (SAR). **We cannot process your financial aid until verification has been completed; therefore, please provide the required documents as soon as possible.**

What you should do

1. Collect your and your spouse's financial documents.
2. Contact us if you have questions about completing this worksheet.
3. Fill in and sign the worksheet—your spouse is not required to sign.
4. Submit the completed worksheet, signed tax forms, and any other documents requested to our office.
5. We will compare information on the documents and make corrections if necessary.

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

STUDENT INFORMATION

Last name First name M.I. ____________________

Student Number ____________________

Address (include apt. no.) ____________________

Date of birth ____________________

City State ZIP code ____________________

Phone number (include area code) ____________________

FAMILY INFORMATION

List the people in your <u>household;</u> 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, 2008, through June 30, 2009, and
- other people if they now live with you and 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.

Write the names of **all** household members in the space below. Also, write in the name of the college for any household member who will be attending college at least half-time between July 1, 2008, and June 30, 2009, and will be enrolled in a degree, diploma, or certificate program. If you need additional space, attach a separate sheet.

Full Name	**Age**	**Relationship**	**College**
Missy Jones (example)	*24*	*Wife*	*Gadsden State C C*
		Self	

TAX FORMS AND INCOME INFORMATION

Check **one** box only in each column. Tax returns include the 2007 IRS Form 1040, 1040A, 1040EZ, TeleFile Tax Record, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of the tax return, request a copy from your tax preparer or a transcript form from the Internal Revenue Service that lists tax account information. The IRS may be contacted at 800-829-3676.

STUDENT

- ☐ Check and attach **signed 2007 U S tax return.**
- ☐ Check here if you **will not** file and **are not** required to file a 2007 U.S. Income Tax Return. If applicable, submit W-2(s).

SPOUSE

- ☐ Check and attach **signed 2007 U S tax return.**
- ☐ Check here if your spouse **will not** file and is **not required** to file a 2007 U.S. Income Tax Return. If applicable, submit W-2(s).

◀OVER▶

REPORT ANNUAL AMOUNTS FOR CALENDAR YEAR 2007

Student	WORKSHEET A	Spouse if applicable
$	Earned income credit --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 for **all household members** that were not taxed (such as SSI).	$
$	← **TOTAL** →	$

Student	WORKSHEET B	Spouse
$	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 Boxes12a 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 **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**	$
$	Foreign income exclusion from IRS **Form 2555-line 45** or **2555EZ-line 18**	$
$	Untaxed portions of IRA distributions from IRS Form **1040-lines (15a minus 15b)** or **1040-A 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 **1040-A lines (12a minus 12b**). **Exclude rollovers.** If negative, enter a zero here.	$
$	Credit for federal tax on special fuels from **IRS Form 4136-line 17** (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)	$
$	Veteran's non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances	$
$	Other untaxed income not reported elsewhere on Worksheets A or B, such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Tax filers only report combat pay not included in AGI (FAFSA questions 35 and 79. Don't include student aid, Workforce Investment Act educational benefits, combat pay if you are not a tax filer, or benefits from flexible spending arrangements (e.g., cafeteria plans).	$
	Money **received**, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	
$	← **TOTAL** →	$

Student	WORKSHEET C	Spouse
$	Education credits (Hope and Lifetime Learning tax credits)--IRS Form **1040-line 49** or **1040A-line 31**	$
$	Child support **paid** because of divorce or separation or as a result of a legal requirement. Do not include support for children living in your (or your parents') household. List child(ren)'s name(s):	$
$	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 (or your parents') adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	$
$	← **TOTAL** →	$

If you did not file and are not required to file a 2007 Federal income tax return; list below your employer(s) and any income received in 2007. **(Use the W-2 form or other earnings statements.)**

STUDENT

Employer	2007 Amount

SPOUSE

Employer	2007 Amount

Sign this Worksheet

By signing this worksheet, we certify that all the information reported to qualify for Federal student aid is complete and correct.

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

Student __________ **Date** __________ **Spouse** __________ **Date**

RETURN FORM TO GADSDEN STATE COMMUNITY COLLEGE AT ONE OF THE ADDRESSES BELOW

Financial Aid Office
Wallace Drive Campus
P O Box 227
Gadsden, AL 35902-0227
Phone: 256-549-8264

Financial Aid Office
McClellan Center
100-A Gamecock Drive
Anniston, AL 36206
Phone: 256-238-9341

Financial Aid Office
Harry M. Ayers Campus
P O Box 1647
Anniston, AL 36202
Phone: 256-835-5420