



Student Financial Services

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2009 - 2010 INDEPENDENT VERIFICATION FORM

STUDENT NAME: _____ SPU ID: _____

Your application was selected for review in a process called "Verification". In this process, SPU will be comparing information from your FAFSA with signed copies of your 2008 Federal tax return, your spouses' 2008 Federal tax return, or W-2 forms or any other financial documents. If there are differences between your application information and your financial documents, SPU may need to make corrections to your FAFSA electronically. Please complete this verification form and submit it to Student Financial Services as soon as possible, to avoid delaying your financial aid.
SPU must review the requested information, under the financial aid program regulations (34 CFR, Part 668).

What you should do

1. Collect your (and your spouse's) financial documents (signed Federal income tax returns, W-2 forms, etc.).
2. Complete both sides of this worksheet and sign it. **Please do not leave any blanks; if the question does not apply enter N/A or 0.**
3. Submit the completed worksheet, tax forms, and any other documents needed to Student Financial Services.

A. Family Information

List the people you (and your spouse) will support between **July 1, 2009 and June 30, 2010**. Attach additional pages if necessary. Include:

- Yourself
- Your spouse (if married)
- Your children **if** you will provide **more than half** their support between July 1, 2009 and June 30, 2010.
- Other people if they live with you, you provide **more than half** their support **and** you will continue to provide this support between July 1, 2009 and June 30, 2010 (including money, gifts, housing, medical and dental care, college costs, etc.)
- Indicate others as in college only if they will enroll in a program that leads to a college degree or certificate and attend at least half-time in 2009-2010.

Name	Relationship to Applicant	Age	2009 - 2010 College Name (if applicable)
	Self		SPU

B. Tax Forms (all applicants)

Student: Check only one box below. Tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of your tax return, request a copy from the tax preparer or an Internal Revenue Service form that lists tax account information (available at: 1(800) 829-1040 or <http://www.irs.gov>).

- Signed tax return is attached. Did not/will not file and are not required to file a 2008 tax return. *If so, you must visit <http://www.spu.edu/sfs> and click on Financial Aid Documents to obtain a Student (Spouse) Non-Filer Form to complete and return.*

Spouse: Check only one box below. Tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of your tax return, request a copy from the tax preparer or an Internal Revenue Service form that lists tax account information (available at: 1(800) 829-1040 or <http://www.irs.gov>).

- Signed tax return is attached. Did not/will not file and are not required to file a 2008 tax return. *If so, you must visit <http://www.spu.edu/sfs> and click on Financial Aid Documents to obtain a Student (Spouse) Non-Filer Form to complete and return.*

C. Additional Financial Information (See student/spouse question 46 on the FAFSA)

<i>Do not leave any blanks; if the answer is zero or does not apply enter 0.</i>	Student	Spouse
Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 – line 50 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 in your (or your parents') household.		
Taxable earnings from 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 on your tax return(s). Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.		
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.		
TOTAL		

D. Untaxed Income (See student/spouse question 47 on the FAFSA)

This section is to verify the figures entered on question 47 Student/Spouse on your 2009 - 2010 Free Application for Federal Student Aid (FAFSA). Please list the amounts earned or paid in each category.

<i>Do not leave any blanks; if the answer is zero or does not apply enter 0.</i>	Student	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 Boxes 12a through 12d codes D,E,F,G,H, and S.		
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040-total of lines 28 plus 32 or 1040A – line 17.		
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.		
Untaxed portions of IRA distributions from IRS Form 1040 – lines 15a minus 15b or 1040A – line 11a minus 11b. Exclude rollovers. If negative, enter a zero here.		
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.		
Housing, food, and other living allowances provided to members of the military, clergy, and others (including cash payments or cash value of benefits reported on the W-2 Form, box 14)		
Veterans' non-education benefits such as Disability, Death Pension, or Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.		
Other untaxed income not reported, such as workers' compensation, disability, etc. Do not include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, 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. (Support includes money, gifts, housing, food, clothing, car payments or expenses, medical and dental care, and college costs paid for on your behalf.)		

D. Sign this Worksheet

By signing this worksheet, we certify that all the information reported on it is complete and correct.

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

Student Signature	Date	Phone	Email
Spouse Signature (if applicable)	Date	Phone	Email

Make sure that tax forms are signed and indicate the student's SPU ID or SSN.