

SUNY FREDONIA

INDEPENDENT



2009-2010 Verification Worksheet

Federal Student Aid Programs

Office of Financial Aid
 S123 Williams Center
 (716) 673-3253
 Fax#: (716) 673-3785

Your application was selected for review in a process called "Verification." In this process, your school will be comparing information from your application with signed copies of your (and your spouse's, if you are married) 2008 Federal tax forms, or with W-2 forms or other financial documents. The law says we have the right to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, you or your school may need to make corrections electronically or by using your Student Aid Report (SAR).

Complete this verification form and submit it to Fredonia as soon as possible, so that your financial aid won't be delayed. Your financial aid administrator will help you.

What you should do

1. Collect your (and your spouse's) financial documents (signed Federal income tax forms, W-2 forms, etc.).
2. Talk to your financial aid administrator if you have questions about completing this worksheet.
3. Fill in and sign the worksheet.
4. Submit the completed worksheet, tax forms, and any other documents your school needs to your financial aid administrator.
5. Your financial aid administrator will compare information on this worksheet and any supporting documents with the information you submitted on your application. You may need to make corrections electronically or by using your SAR.

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

A. Student Information

 Last Name First Name M.I.

 Fredonia ID Number

 Address (include apt. no.)

 Date of Birth

 City State Zip Code

 Phone Number (include area code)

B. Family Information

List the people that you (and your spouse) will support between July 1, 2009 and June 30, 2010. Include:

- * yourself
- * your spouse
- * your dependent children (if you provide more than half of their support).

Include other people as part of your family only if:
 *they lived with you and got more than half their support from you (or your spouse) at the time you completed your student aid application.
 AND
 *they will continue to get more than half their support from you from July 1, 2009 through June 30, 2010.

Write the names of all family members in the space(s) below. Also write in the name of the college for any family member who will be attending college at least half-time between July 1, 2009 and June 30, 2010, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
		<i>Self</i>	<i>SUNY Fredonia</i>

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information is 1845-0041. The time required to complete this information collection is estimated to average twelve minutes, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: U.S. Department of Education, Washington, DC 20202-5345.

C. Student's Tax Forms and Income Information

Independent

1. Check only one of the boxes 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 the tax return, request a Tax Transcript or use Form 4506-T from the Internal Revenue Service by calling 1-800-829-1040 or obtain a copy from your tax preparer.

- Check and attach signed tax return.
- Check and complete: signed tax return will be mailed to the school by _____ (date).
- Check here if you received **Federal Work Study** in 2008; indicate amount earned: _____
- Check here if you will not file and are not required to file a 2008 U.S. Income Tax Return.

2. If you did not file and are not required to file a 2008 Federal income tax return, list below your employer(s) and any income received in 2008.

Sources (Use the W-2 form or other earning statements.)	Amount

D. Spouse's Tax Forms and Income Information (if student is married).

1. Check only one box below. Tax returns includes the 2008 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If your spouse did not keep a copy of the tax return, request a Tax Transcript or use Form 4506-T from the Internal Revenue Service by calling 1-800-829-1040 or obtain a copy from your tax preparer.

- Check if you and your spouse did or will file a joint return.
- Check and attach spouse's signed tax return if your spouse filed a separate return.
- Check and complete: signed tax return will be mailed to the school by _____ (date).
- Check here if you will not file and are not required to file a 2008 U.S. Income Tax Return.

2. If your spouse did not file and is not required to file a 2008 Federal income tax return, list below your spouse's employer(s) and any income received in 2008.

Sources (Use the W-2 form or other earnings statements.)	Amount

2008 Additional Financial Info Report Annual Amounts

- \$ _____ Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 or 1040A-line 31.
Annual amount of child support you **paid** because of divorce or separation or as a result of a legal requirement.
- \$ _____ Don't include support for children in your household.
- \$ _____ 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 or scholarship portions of fellowship and assistantships.
- \$ _____ Combat pay or special combat pay. (Only enter the amount that was taxable and included in the adjusted gross income. **Don't include** untaxed combat pay reported on the W-2 (Box 12, Code Q).)

\$ _____ Total

2008 Untaxed Income Report Annual Amounts

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, and Keogh and other qualified plans from IRS Form 1040-total of lines 28+32 or 1040A-line 17.
\$	Annual amount of 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.
\$	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.
\$	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 paid to members of the military, clergy, and others (including cash payments and cash value of benefits).
\$	Veterans' noneducation 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 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, combat pay benefits from flexible spending arrangements (e.g., cafeteria), 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

F. Sign this Worksheet

By signing this worksheet, I (we) certify that all information reported to qualify for Federal student aid is complete and correct. If married, spouse's signature is optional.

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

PLEASE TAKE OR MAIL THIS WORKSHEET, ALONG WITH YOUR SIGNED 2008 FEDERAL TAX RETURNS AND W-2'S TO THE FINANCIAL AID OFFICE AT:

**SUNY FREDONIA
OFFICE OF FINANCIAL AID
S123 Williams Center
FREDONIA, NY 14063**

**PLEASE DO NOT SUBMIT THIS WORKSHEET
UNTIL YOU HAVE INCLUDED THE
FOLLOWING DOCUMENTS:**

- **Signed copies of the Student's 2008 Federal Tax Return**
- **Copies of the Student's 2008 W-2's**
- **Also be sure to sign and fully complete this Verification Worksheet**