

## 2009-2010 Verification Worksheet Federal Student Aid Programs

Your application was selected for review in a process called "Verification." In this process, Appalachian State University's Office of Student Financial Aid, an office in the Division of Student Development, will be comparing information from your Free Application for Federal Student Aid (FAFSA) with signed copies of your (and your spouse's, if you are married) 2008 Federal Income Tax Returns, W-2 forms, or other financial documents. The law says we have a right to ask you for this information before awarding federal aid. If there are differences between your FAFSA information and your financial documents, in most cases Appalachian State University will be able to send the corrections electronically, to have your information reprocessed.

Try to complete verification as soon as possible, so that your financial aid won't be delayed. Please carefully read and follow the directions in the next column.

Please note that IRS Form 8453 and other Electronic Filing Declaration Forms by themselves are **NOT** acceptable for verification. A **signed** copy of the tax return prepared at the time of the Electronic Filing Declaration is required.

*Appalachian State University must review the requested information, under the financial aid program rules (34 CFR, Part 668).*

### SECTION A: Student Information

\_\_\_\_\_  
Last name                      First name                      M.I.

\_\_\_\_\_  
Address (include apt. no.)

\_\_\_\_\_  
City                      State                      ZIP Code

### Section B: Family Information

List the people in your household; 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
- ◆ 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, 2009 through June 30, 2010.

Write the names of all household members in the space(s) 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, 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
Missy Jones (Example)	24	Wife	City University
		Self	Appalachian State University

### Section C: Student's Tax Forms and Income Information (all applicants)

1. Check the applicable box below. Tax returns include 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 your tax preparer or a transcript of your return from the Internal Revenue Service. You may request a transcript of your 2008 Federal Tax Return by calling the IRS at 1-800-829-1040.

Check and attach your **signed** tax return (Including ALL schedules and 2008 W-2 Forms, if available). Continue to Section D.

Check here if you will not file and **are not required** to file a 2008 U.S. Income Tax Return and complete the information in the blocks below.

Enter on the lines below your employer(s) and any income earned from work. Enter "None" if you did not work in 2008. Continue to Section D.

Sources (Attach W-2 forms or other earnings statements)	Amount (Write " <b>NONE</b> " if you DID NOT WORK in 2008.)

### **What you should do:**

- Collect a **signed** copy of your and your spouse's, (if you are married) 2008 Federal Income Tax Return and W-2 forms. **Please make sure these are signed. Unsigned forms will cause delays.**
- Fill in and sign this worksheet-you must sign this worksheet.
- You may mail, fax, or bring this completed worksheet, tax forms, and any other requested documents to this address:  
**Mailing address:**  
Appalachian State University, Office of Student Financial Aid  
ASU Box 32059, John Thomas Hall  
Boone, NC 28608-2059  
**Telephone Number:** 828-262-2190 **Fax Number:** 828-262-2585
- The Office of Student Financial Aid will compare the information on the documents submitted with your FAFSA information. If corrections are necessary, in most cases we will submit the corrections electronically to the application processor. If we do submit corrections you will receive an updated Student Aid Report.
- If you have any questions about completing this form or the documents required, please contact our office.

\_\_\_\_\_  
Social Security Number                      Banner ID Number

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Phone Number (include area code)

**Section D: Spouse's Tax Forms and Income Information (if student is married)**

**Independent**

1. Check the applicable box below. Tax returns include 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 their tax return, they may request a copy from their tax preparer or a transcript of their return from the Internal Revenue Service. They may request a transcript of their 2008 Federal Tax Return by calling the IRS at 1-800-829-1040.

Check and attach a **signed** tax return (Including ALL schedules and W-2 Forms, if available). Continue to Section E.

Check here if your spouse will not file and is **not required** to file a 2008 U.S. Income Tax Return and complete the information in the blocks below.

Enter on the lines below their employer(s) and any income earned from work. Enter "None" if they did not work in 2008. Continue to Section E.

Sources (Attach W-2 forms or other earnings statements)	Amount	Write "NONE" if they DID NOT WORK in 2008.

**NOTE: A RESPONSE IS REQUIRED IN THE BLOCKS BELOW EVEN IF THE RESPONSE IS \$0**

**Section E: 2008 Additional Financial Information from Free Application for Federal Student Aid  
(Report Annual Amounts 1/01/08 to 12/31/08)**

Refer to Question 46 of the FAFSA. Enter an amount for each item or \$0 if none or does not apply	Student/Spouse
Child support <b>paid</b> because of divorce or separation or as a result of a legal requirement. <b>Don't include</b> support for children in your household, as reported in question 96 of the FAFSA. If your response is more than \$0 please attach a signed statement listing the child's(ren's) full name(s), age(s), and that the support paid was the result of a divorce/separation or legal requirement.	\$
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
Grant and scholarship aid reported to the IRS in the 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 the adjusted gross income. <b>Do not</b> enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$

**Section F: 2008 Untaxed Income from Free Application for Federal Student Aid (Report Annual Amounts 1/01/08 to 12/31/08)**

Refer to Question 47 of the FAFSA. Enter an amount for each item or \$0 if none or does not apply.	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.	\$
Enter child support <b>received</b> for all children as listed in Section B of this form. <b>NOTE:</b> If you enter \$0 for this item and there are children under age 18 listed in Section B of this form and you (or your spouse) listed in Section B of this form are separated/divorced from the natural parent, please attach a statement signed by you as to why no child support is received. <b>Don't include</b> foster care or adoption payments.	\$
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 not reported elsewhere such as workers' compensation, disability, untaxed portions of railroad retirement benefits, Black Lung Benefits, etc. <b>Don't include</b> 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 <b>received</b> , or paid on your behalf (e.g., bills), not reported elsewhere on this form	\$

**Section G: Sign this Worksheet**

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

By signing this worksheet, I (we) certify that all the information reported on it is complete and correct. If married, spouse's signature is optional.

X \_\_\_\_\_ X \_\_\_\_\_  
 Student Signature Date Spouse Signature Date