

SOUTHERN POLYTECHNIC STATE UNIVERSITY
Office of Scholarships and Financial Aid

2007-2008 VERIFICATION WORKSHEET

Name: _____ Student I.D. Number : _____
Address: _____ Telephone Number: _____
_____ E-Mail Address: _____

Instructions for Completion

Your 2007-2008 Free Application for Federal Student Aid has been selected for review in a process called Verification. You must complete all sections of this form and return it to our office along with **signed** copies of your (and parents' if required) 2006 Federal Income Tax Returns and all 2006 W-2 forms. Acceptable tax forms include: 1040, 1040A, 1040EZ, Telefile Tax Record, or foreign income tax returns. **Electronic Form 8453 is NOT acceptable.** If you do not have a copy of your tax return, you must request an itemized tax transcript from the IRS (1-800-829-1040). Copies of your 2006 W-2's can also be obtained by contacting your employer(s). **Please include the student's Social Security number on all documents submitted to our office for Verification.**

You must complete the verification process in order to receive Federal Student Financial Aid. This process includes the following:

1. Completion of all sections of the verification worksheet, including worksheets A, B, and C (entering "0" where applicable).
2. You must sign the verification worksheet as well as copies of all Federal Tax Forms.
3. You must enclose all copies of 2006 Federal Tax Returns and W-2's. If you did not file a tax return, you must provide a non-filing statement (Form 1722), which can be obtained by contacting the IRS (1800-829-1040).
4. All W-2's must be enclosed even if no Tax Return was filed.

Section A: Student Status

Please answer all of the following questions and provide the requested documentation. If you answer "Yes" to more than one question, it is only necessary for you to provide documentation for one of these questions.

1. Were you born before January 1, 1984? (If "Yes", provide a copy of your birth certificate or driver's license) Yes NO
2. During the school year 2007-2008, will you be working on a master's or doctorate degree, such as a MA, MBA, MD, JD, PhD, or graduate certificate? Yes NO
3. As of today, are you married? Answer yes if you are separated but not divorced. (If "Yes", provide a copy of your marriage certificate) Yes NO
4. Are you an orphan or ward of the court or were you a ward of the court until age 18? (If "Yes", provide court documentation) Yes NO
5. Are you a veteran of the U.S. Armed Forces? (If "Yes", provide a copy of your DD214) Yes NO
6. Do you have dependents other than your children or spouse who, now through June 30, 2008, will live with you and will receive more than half of their support from you? Yes NO

If you answered "Yes" to any of the above questions, skip Section B. Proceed to and complete sections C, D, E, F, and G with your and your spouse's (if applicable) information. If you answered "No" to all of the above questions, proceed to Section B.

Section B: Legal Dependents

Complete this section only if you answered "No" to all questions in Section A.

Do you, the student, have any children who receive and will continue to receive more than half of their support from you?

Yes No

- If "Yes":
1. Do you claim the child as a tax exemption? Yes No
 2. Does the child live with you full-time? Yes No
 3. Will the child continue to live with you during the period of July 1, 2007 to June 30, 2008, And will you provide more than one half of his/her total support during that period? Yes No

If you answered "Yes" to all of the questions in Section B, proceed to and complete sections C, D, E, F, and G with your and your spouse's (if applicable) information. If you answered "No" to any of the questions in Section B, you **must** provide your and your parent's information for Sections C, D, E, F, and G. You may be required to provide documentation supporting your answers.

Student's Name _____ Student I.D. # _____
 Last First MI

SECTION C: HOUSEHOLD INFORMATION (INCLUDES SPOUSE OF PARENT).

Please list below the members of your household.

If you answered "No" to all of the questions in Sections A and to any of the questions in Section B, include in your household:

- ◆ Yourself
- ◆ Your parents
- ◆ Your parents' other children if (a) your parents provide more than half of their support or (b) the children could answer "No" to every question in Sections A and B.
- ◆ Any individuals who currently live with your parents, receive more than half of their support from your parents, and will continue to receive more than half of their support from your parents between July 1, 2007 and June 30, 2008.

If you answered "Yes" to any of the questions in Section A or to all of the questions in Section B, include in your household:

- ◆ Yourself
- ◆ Your spouse
- ◆ Your children, if you provide more than half of their support
- ◆ Any individuals who currently live with you, receive more than half of their support from you, and will continue to receive more than half of their support from you between July 1, 2007 and June 30, 2008.

Name	Age	Relationship	College attended July 1, 2007 to June 30, 2008	Credit hrs. enrolled	College level	Date of graduation
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Student: _____
 Spouse: _____
 Parent: _____
 Parent: _____
 Other: _____
 Other: _____

If you have additional household members, please list them on a separate sheet.

Section D: Tax Information

Please check the form filed by each individual listed below and attach complete signed copies of each individual's 2006 Federal Income Tax Returns (including all schedules) and all W-2 and 1099 forms.

	Telefile	1040	1040EZ	1040A	E-file/1040PC	Not required to file
Student	_____	_____	_____	_____	_____	_____
Spouse	_____	_____	_____	_____	_____	_____
Mother	_____	_____	_____	_____	_____	_____
Father	_____	_____	_____	_____	_____	_____

Complete this area only if you, your spouse, or your parents will not file and/or are not required to file a 2006 Federal Income Tax Return. Please provide W-2 and/or 1099 forms when appropriate. You must also contact the IRS at 1-(800) 829-1040 to obtain a form 1722/Non-filing statement.

"IF LOW OR NO INCOME IS REPORTED, ADDITIONAL DOCUMENTATION MAY BE REQUIRED"

1. If you, the student, are not required to file a 2006 Federal Income Tax Return, did you work in 2006?
 No Yes: Employer _____ Total Yearly Earnings \$ _____
2. If your spouse or parent(s) was not required to file a 2006 Federal Income Tax Return, did he/she work in 2006?
 No Yes: Employer _____ Total Yearly Earnings \$ _____
3. Did you, the student receive unemployment compensation in 2006?
 No Yes: Employer _____ Total Yearly Earnings \$ _____
4. Did your spouse or parent(s) receive unemployment compensation in 2006?
 No Yes: Employer _____ Total Yearly Earnings \$ _____

Student's Name _____
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5. Did you, the student, receive Social Security benefits in 2006? No Yes: Total Yearly Benefits \$ _____

6. Did your spouse or parent(s) receive Social Security benefits in 2006? No Yes: Total Yearly Benefits \$ _____

Section E: Worksheets A, B, and C

Please complete and include copies of supporting documentation. Do not leave any boxes blank. Enter "0" for items not applicable.

Student (and Spouse)

Parent(s) (and step-parent)

WORKSHEET A	
\$ _____ Earned income credit from IRS Form 1040 line 66a; 1040A line 40a; 1040EZ line 8a; or Telefile line 17	\$ _____
\$ _____ 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 that were not taxed (such as SSI)	\$ _____
WORKSHEET B	
\$ _____ 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.	\$ _____
\$ _____ Child support you received for all children. Don't include foster care or adoption payments.	\$ _____
\$ _____ Tax exempt interest income from IRS Form 1040—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 1040A—lines (11a minus 11b). Exclude rollovers. If negative, enter 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 zero here.	\$ _____
\$ _____ Credit for federal tax on special fuels from IRS Form 4136—line 20 – (nonfarmers only).	\$ _____
\$ _____ Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments ad 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 on Worksheets A and B, such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Don't include student aid, Workforce Investment Act educational benefits, 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	\$ _____
WORKSHEET C	
\$ _____ Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040—line 50 or 1040A—line 31.	\$ _____
\$ _____ 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 (or your parents') household, as reported in question 90 (or question 66 for your parents.	\$ _____
\$ _____ 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.	\$ _____

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Section F: Asset Information

Please complete and include copies of supporting documentation. Do not leave any boxes blank. Enter "0" for items not applicable.

Note: If net worth is one million dollars or more, enter \$999,999. If net worth is negative, enter "0". Amounts entered should be balances as of the date you completed the Free Application for Federal Student Aid (FAFSA).

Student/Spouse		Parent(s)
\$	Net worth of investments* as of the date you filed your FAFSA (use guide below to determine amount).	\$

Total **Investment Value** \$ _____ minus **Investment Debt** \$ _____ equals **Net Worth** \$ _____

***Investments** include real estate (other than your home), trust funds, money market funds, mutual funds, certificates of deposit, stocks, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc. **Investment value** is the market value of these investments. Do not include the value of life insurance and retirement plans (pension funds, annuities, IRA plans, Keogh plans, etc.) or the value of prepaid tuition plans. **Investment debt** includes only debt related to the investments.

Student/Spouse		Parent(s)
\$	Total balance of cash, savings, and checking accounts as of the date you filed your FAFSA	\$

Student/Spouse		Parent(s)
\$	Net work of business* and/or investment farms as of the date you filed your FAFSA (use guide below to determine amount)	\$

Total **Business Value** \$ _____ minus **Business Debt** \$ _____ equals **Net Worth** \$ _____

***Business value** includes the market value of land, buildings, machinery, equipment, and inventory. **Business debt** includes only those debts for which the business was used as collateral.

Section G: Signatures

Under penalty of perjury my signature below certifies and confirms that I have read and understood all instructions and that I have provided accurate, complete, and current information to the best of my knowledge.

Students Signature _____ Date _____
 Spouse's Signature _____ Date _____
 Mother's Signature _____ Date _____
 Father's Signature _____ Date _____

- ◆ **PLEASE REVIEW ALL OF THE INFORMATION ON THIS FORM AND THE SUPPORTING DOCUMENTATION FOR COMPLETENESS AND BE SURE THAT ALL APPROPRIATE SIGNATURES HAVE BEEN PROVIDED.**
- ◆ **MAKE SURE ALL COPIES ARE LEGIBLE AND INCLUDE THE STUDENT'S NAME AND SOCIAL SECURITY NUMBER**
- ◆ **RETURN THIS WORKSHEET AND REQUIRED DOCUMENTATION TO THE OFFICE OF SCHOLARSHIPS AND FINANCIAL AID.**
- ◆ **WE CANNOT AWARD YOU FINANCIAL AID UNTIL YOUR FILE IS COMPLETE.**

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