

2009-2010

Dependent Verification Worksheet

Office of Financial Aid ● Valparaiso University

Your application was selected for review in a process called "Verification." In this process, we will be comparing information from your FAFSA with signed copies of your and your parent(s)' 2008 Federal tax forms, W-2 forms and other financial documents.

What you should do:

1. Collect your and your parent(s)' federal income tax return and W-2 forms. (We do not need the state tax return.)
2. Make sure the taxes are signed.
3. Complete and sign this worksheet -- you and at least one parent must sign.
4. Return the completed worksheet, tax forms, and any other requested documents to the Financial Aid Office.
5. We will compare information on the documents to the information you provided on the FAFSA and will make any necessary corrections.

Please submit the requested verification documents as soon as possible so that your financial aid won't be delayed.

The Financial Aid Office 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.	Social Security Number	
Your Permanent Home Address (include Apt. #)			Date of Birth	
City	State	Zip	Area Code	Phone Number

1. 2008 Federal Tax Return (IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico, or a foreign income tax return.)

- Attached is a signed copy of my federal tax return. (Do not send your state tax return.)
If you did not keep a copy of your tax return, request a copy from your tax preparer or request a tax transcript by completing IRS Form 4506-T (available on our web site) or call the IRS at 1.800.829.1040.
- I will submit a signed copy of my federal tax return to the Financial Aid Office by _____ (date).
- Check here if you will not file and are not required to file a federal tax return. (Typically, if your income is more than \$5150, you must file a federal tax return. Please refer to www.IRS.gov for more specific filing requirements.)

2. 2008 W-2 Forms

- Attached are legible copies of my W-2 forms. (Copies of your W-2 forms may be requested from your employer.)
- I will submit my W-2 forms by _____ (date).
- Check here if you were self-employed and do not have W-2 forms.
- Check here if you did not work and do not have W-2 forms.
- Check here if you did work but can't find all W-2 forms.

Missing W-2 employer _____ Approx amount earned \$ _____

Missing W-2 employer _____ Approx amount earned \$ _____

3. 2008 Untaxed Income

- Check here if you had no income other than that listed on your federal tax return
- I did have untaxed income such as payments to a retirement plan, tax exempt interest, veterans noneducational benefits, disability, workers' compensation, or other income not reported elsewhere. (Please list source of income and amount below, but **do not include student aid, welfare, untaxed Social Security.**)

Source _____ Annual amount \$ _____

Source _____ Annual amount \$ _____

Return completed form to: Office of Financial Aid | 1700 Chapel Drive | Valparaiso, IN 46383
Or fax to: 219-464-5012

SECTION B: Family Information

List all the people in your parents' household; include yourself and:

- Your parent(s) you live with (include your stepparent if custodial parent is remarried)
- Your parents' other children, if (a) your parents will provide more than half of their support from July 1, 2009 through June 30, 2010 or (b) the children would be required to provide parental information when applying for Federal Student Aid
- Other people if they now live with your parents, and your parents 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.

Name	Age	Relationship to the student	Name of College attending during 2009-2010 (Must be enrolled at least half-time.)	What type of degree are they seeking? (Undergraduate, Graduate, or non-degree seeking)
		Self	Valparaiso University	Undergraduate degree

SECTION C: Parent(s)' Information

(Please provide information for the parent(s) listed above. If separate tax returns were filed, we need copies of both returns)

1. 2008 Federal Tax Return (IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico, or a foreign income tax return.)

- Attached is a signed copy of my parent's federal tax return. (Do not send your state tax return.)
If you did not keep a copy of your tax return, request a copy from your tax preparer or request a tax transcript by completing IRS Form 4506-T (available on our web site) or call the IRS at 1.800.829.1040.
- I will submit my parent's federal tax return to the Financial Aid Office by _____ (date).
- Check here if your parents will not file and are not required to file a federal tax return. (Typically, if you are married and your combined income is more than \$16,900 or single and income is more than \$8,450, a federal tax return must be filed. Please refer to www.IRS.gov for more specific filing requirements.)

2. 2008 W-2 Forms (Copies of W-2 forms may be requested from your employer.)

Father / Step-father

- Attached are legible copies of my (step) father's W-2 forms.
- Was self-employed and does not have W-2 forms.
- Did not work and does not have W-2 forms.
- Did work but can't find all W-2 forms.

Mother / Step-mother

- Attached are legible copies of my (step) mother's W-2 forms.
- Was self-employed and does not have W-2 forms.
- Did not work and does not have W-2 forms.
- Did work but can't find all W-2 forms.

Missing W-2 employer _____ Approx amt earned \$ _____ Which parent _____

Missing W-2 employer _____ Approx amt earned \$ _____ Which parent _____

3. 2008 Untaxed Income

- Check here if your parent(s) had no income other than that listed on their federal tax return
- They did have untaxed income such as payments to a retirement plan, child support, a clergy or military housing allowance, tax exempt interest, veterans noneducational benefits, disability, workers' compensation, or other income not reported elsewhere. (Please list source of income and amount below, but **do not include student aid, welfare, untaxed Social Security, child tax credit, earned income credit, combat pay, flex spending, or foreign income exclusion.**)

Payments to tax-deferred pension (paid directly or withheld from earnings) (IRA, 401K, 403B, Keogh, SEP, SIMPLE, etc.) Annual amount \$ _____

Clergy or military housing, food and other living allowance / Parsonage (cash payment or value of benefit) Annual amount \$ _____

Child support received for all children Annual amount \$ _____

Other income source _____ Annual amount \$ _____

SECTION D: Certification (Student and at least one parent must sign.)

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

Parent Signature _____

Date _____

Student Signature _____

Date _____