

# 2009-2010

## Independent 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 spouse's, if you are married) 2008 Federal tax forms, W-2 forms and other financial documents.

### What you should do:

1. Collect your (and your spouse'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.
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

### SECTION B: Family Information

List the people in your household; include:

- Yourself
- Your spouse, if married
- Your children, if they live with you and you will provide more than half of their support from July 1, 2009 through June 30, 2010
- 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.

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

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

## SECTION C: Income Information

### 1. 2008 Federal Tax Return (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 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 am single and attached is a signed copy of my federal tax return. (Do not send your state tax return)
- I am married and my spouse and I filed a joint tax return. A signed copy of our federal tax return is attached.
- I am married and my spouse and I filed separate tax returns. Please attach signed copies of both federal tax returns.
- I (we) will submit the 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 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 your W-2 forms may be requested from your employer.)

#### Student

- Attached are legible copies of my W-2 forms.
- I was self-employed and do not have W-2 forms.
- I did not work and do not have W-2 forms.
- I did work but can't find all my W-2 forms.

Missing W-2 employer \_\_\_\_\_

Approx amount earned \$ \_\_\_\_\_

Missing W-2 employer \_\_\_\_\_

Approx amount earned \$ \_\_\_\_\_

#### Spouse

- Attached are legible copies of my spouse'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 the 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 (We) 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 (If married, spouse's signature is optional.)

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

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature

\_\_\_\_\_  
Date