

INDEPENDENT VERIFICATION WORKSHEET

2009-2010

Student's Name: _____

N# _____

Address: _____

Date of Birth: ____/____/____

City: _____ State: _____ Zip: _____

Phone#: (____) ____-____

Email Address: _____

- Your Student Aid Report has been selected for verification. Federal regulations require that we check the accuracy of the information you provided on your 2009-2010 FAFSA.
- Your financial aid award continues to be estimated and subject to change until verification is complete. No offer of financial aid is authorized for disbursement until verification is complete.
- If a question does not apply to you or your spouse **do not leave it blank**. Instead mark the answer zero or N/A for not applicable.
- Do not skip any questions. **If you skip any question or section, your entire packet may be marked as incomplete and will delay the processing of aid until completed packet is received and reviewed.**

- All documents (including spouse's tax documents) must have the student's name and N number clearly marked **at the top of every page** submitted.
- Be sure to include **signed copies** of your and your spouse's 2008 tax returns (i.e. 1040, W2's and 1099's) if applicable. Original documents submitted to UNF will not be returned to you. If necessary, you can make copies at One Stop for a small fee.

Return these completed documents to:
UNF Enrollment Services Processing,
1 UNF Drive, Jacksonville, FL 32224
Or Fax to (904) 620-2414

PLEASE do not fax tax returns longer than 10 pages. Returns of more than 10 pages must be mailed or delivered in person to UNF One Stop Student Services.

PLEASE READ AND FOLLOW THE INSTRUCTIONS FOR EACH SECTION BELOW.

Section I: Student and Spouse (if married)

A. Mark all that apply.

In 2008, did you and/or your spouse receive benefits from any of the federal benefit programs listed below?
 SSI Food Stamps Free or Reduced Lunch TANF WIC

B. 2008 Tax Filers

You must submit signed legible copies of your and your spouse's **2008** U.S. Federal Tax return (1040EZ, 1040A, or 1040) and/or **2008** Puerto Rico or Foreign Tax return to our office. *(The electronic cover sheet without the tax return transcripts is not acceptable.)*

Student: check here if you filed or were required to file a **2008** tax return. Filed Did not File

Spouse (if applicable): check here if you filed or were required to file a **2008** tax return. Filed Did not File

C. 2008 Tax Non-Filers (Not required and will not file a 2008 tax return)

Were you required to file a **2008** tax return?

Student Yes No **Spouse** Yes No

If you or your spouse were not required to file a **2008** income tax return, please list each employer's name and the amounts earned in **2008** in the spaces provided below.

Copies of all 2008 W-2 forms received from the employers to verify 2008 income from working must be submitted. Attach a separate sheet, if necessary

Non-filer's name	Name of Employer in 2008	Amount earned in 2008	Did you receive a W2 from this employer?
		\$	Yes <input type="radio"/> No <input type="radio"/>
		\$	Yes <input type="radio"/> No <input type="radio"/>

You may obtain a summary of your 2008 tax information by contacting the IRS and requesting a tax return transcript by calling 1.800.829.1040

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Section II: Student's Household Size & Number in College

Complete section(s) A-C about the people you and your spouse will support from July 1, 2009 through June 30, 2010.

At the time the 2009-2010 FAFSA was first completed, your marital status was (check one option only):

- unmarried
 married/remarried
 separated
 divorced
 widowed

A. List yourself and your spouse (if applicable).

Full name	Date of Birth <i>mm/dd/yyyy</i>	Relationship	If attending college 6+ hours, list: College Name, City, State*	Type of degree seeking
		Self/Student		
		Spouse		

B. List any children/step-children, if you (and your spouse) 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.

Full name	Age	Date of Birth <i>mm/dd/yyyy</i>	Relationship	If attending college 6+ hours, list: College Name, City, State*	Type of degree seeking
<i>John Example</i>	<i>24</i>	<i>01/31/1985</i>	<i>son</i>	<i>UNF Jacksonville, FL</i>	<i>BA</i>

C. List any other person(s) if they now live with you and your spouse (if applicable) 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.

Full name	Age	Date of Birth <i>mm/dd/yyyy</i>	Relationship	If attending college 6+ hours, list: College Name, City, State*	Type of degree seeking
<i>Robert Example</i>		<i>11/1/1938</i>	<i>grandfather</i>		

*Must be enrolled in a degree or certificate program, at least half-time, between July 1, 2009 and June 30, 2010, to list a college

If anyone listed above is not claimed on your (or your spouse's) tax return, please clarify why they are being included in the household size:

Attach separate sheet if necessary.

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Section III: Student/Spouse 2008 Additional Financial Information

(Enter combined amounts for student and spouse)

Everyone must complete each question in this section. Do not leave blank.

Answer each question with the correct amount or zero.

a. Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 – line 50 or 1040A – line 31. \$ _____.

b. Child support paid because of divorce or separation or as a result of a legal requirement. **Don't include** support for children in Section II. \$ _____.

List name(s) of the children for whom these payments were paid in 2008:

c. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships. \$ _____.

d. 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 and scholarship portions of fellowships and assistantships. \$ _____.

e. Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q). \$ _____.

Student/Spouse 2008 Untaxed Income

a. 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 forms in Boxes 12a through 12d, codes \$ _____.

b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 – line 28 + line 32 or 1040A – line 17. \$ _____.

c. Child support received for all children. Don't include foster care or adoption payments. \$ _____.

d. Tax exempt interest income from IRS Form 1040 – line 8b or 1040A—line 8b. \$ _____.

e. 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. \$ _____.

f. 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. \$ _____.

g. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). \$ _____.

h. Veterans non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. \$ _____.

i. Other untaxed income not reported, 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 plans), foreign income exclusion or credit for federal tax on special fuels. \$ _____.

j. Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. \$ _____.

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Section IV: Business Asset Clarification

For tax filers with Business Income on their 2008 IRS Form 1040; does this business employ 100 or more people?

- | | | | |
|-----------------|---------------------------|--------------------------|--|
| Student: | <input type="radio"/> YES | <input type="radio"/> NO | <input type="radio"/> Don't own business |
| Spouse: | <input type="radio"/> YES | <input type="radio"/> NO | <input type="radio"/> Don't own business |

▶▶▶ Attach copies of all 2008 W2 Forms.◀◀◀

▶▶▶ Attach signed copies of complete tax return(s), including attachments.◀◀◀

Section V: Required Signatures

Remember: Failure to answer ALL questions and submit complete tax return and W2 records will result in delay in the processing of your file. Please review this document for skipped sections or questions. Remember to submit signed copies of all tax documents including: 1040's and all schedules, all W2's, any 1099's and/or any other tax related documents along with this form.

Please review ALL sections for COMPLETENESS and ACCURACY

By signing below, you and your spouse (if applicable), certify that all the information on this form and any attached documents are accurate and true.

Student Signature

Date Signed

Spouse Signature (if applicable)

Date Signed