



2009-2010 Verification Worksheet

Federal Student Aid Programs

Dependent

Your application was selected for review in a process called "Verification." In this process, SUNY Oswego will be comparing information from your application with signed copies of your and your parent(s)' 2008 Federal tax forms, or with W-2 forms or other financial documents. The law says we have the right to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, you or Oswego may need to make corrections electronically or by using your Student Aid Report (SAR).

Complete this verification form and submit it to the Financial Aid Office as soon as possible, so that your financial aid won't be delayed.

What you should do

1. Collect your and your parent(s)' financial documents (signed Federal income tax forms, W-2 forms, etc.).
2. Fill in and sign the worksheet, both you and at least one parent.
3. Take, mail or fax the completed worksheet, tax forms, and any other requested documents to the SUNY Oswego Financial Aid Office.
4. The Financial Aid Office will compare information on the documents and make any necessary corrections to your application.

SUNY Oswego must review the requested information, under the financial aid program rules (34 CFR, Part 668).

A. Student Information

_____	_____	_____	_____
Last name	First name	M.I.	Social Security Number
_____			_____
Address (Include apt. no.)			Date of birth
_____	_____	_____	_____
City	State	ZIP code	Phone number (include area code)

B. Family Information

List the people in your **parents' household**, include:

- yourself and your parent(s) (including stepparent) even if you don't live with your parents, and
- your parents' other children, even if they don't live with your parent(s), if (a) your parents 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, and
- 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.

Write the names of all household members. Also write in the name of the college for any household member, excluding your parent(s), 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)	18	Sister	Central University
		Self	

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 1845-0041. The time required to complete this information collection is estimated to average twelve minutes, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: U.S. Department of Education, Washington, DC 20202-5345. If you have comments or concerns regarding the status of your individual submission of this form, write directly to: Application and Pell Processing Systems Division, U.S. Department of Education, 400 Maryland Avenue, S.W., Washington, DC 20202-5345.

C. Student's Tax Forms and Income Information (all applicants)

Dependent

1. Check one box only. Tax returns include the 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 the tax return, request a copy from your tax preparer or a copy of an Internal Revenue Service form that lists tax account information.

- Check and attach signed tax return. **ALSO ATTACH COPIES OF YOUR W-2 FORMS**
- Check and complete: signed tax return will be submitted to the school by _____ (date).
- Check here if you will not file and are not required to file a 2008 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See Question 47 of the FAFSA)

Sources of Untaxed Income	2008 Amount	Sources of Untaxed Income	2008 Amount
a. Child Support	\$	d.	\$
b. Workman's Compensation	\$	e.	\$
c. Untaxed Pensions	\$	f.	\$

3. If you did not file and are not required to file a 2008 Federal income tax return, list below your employer(s) and any income received in 2008 (use the W-2 form or other earnings statements if available).

Sources	2008 Amount
	\$
	\$
	\$

D. Parent(s)' Tax Forms and Income Information

1. Check one box only. Tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If your parent(s) did not keep a copy of the tax return, request a copy from the tax preparer or a copy of an Internal Revenue Service form that lists tax account information.

- Check and attach signed tax return. **ALSO ATTACH COPIES OF W-2 FORMS**
- Check and complete: signed tax return(s) will be submitted to the school by _____ (date).
- Check here if your parent(s) will not file and are not required to file a 2008 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See Question 95 of the FAFSA)

Sources of Untaxed Income	2008 Amount	Sources of Untaxed Income	2008 Amount
a. Child Support	\$	d.	\$
b. Workman's Compensation	\$	e.	\$
c. Untaxed Pensions	\$	f.	\$

3. If you did not file and are not required to file a 2008 Federal income tax return, list below your Parent(s)' employer(s) and any income they received in 2008 (use the W-2 form or other earnings statements if available).

Sources	2008 Amount
	\$
	\$
	\$

E. Sign this Worksheet

By signing this worksheet, we certify that all the information reported on it is complete and correct. The student and at least one parent must sign and date.

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

Student Date

Parent Date

**Do not mail this worksheet to the Department of Education.
Take, mail or fax it to the SUNY Oswego Financial Aid Office.
Don't forget to sign your tax forms and W-2 forms.**

Please Complete the Following:

Student (Question 46)	Calendar Year 2008	Parent(s) (Question 94)
\$ _____	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. Do not include support for children in your (or your parents') household, as reported in question 96 (or question 75 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 and scholarship portions of fellowships and assistantships.	\$ _____
\$ _____	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
TOTAL

Parent TOTAL \$

Student (Question 47)	Calendar Year 2008 – Report Annual Amounts	Parent(s) (Question 95)
\$ _____	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, Keogh and other qualified plans from IRS Form 1040-total of lines 28 + 32 or 1040A-line 17.	\$ _____
\$ _____	Child support received for all children . Don't include foster care or adoption payments.	\$ _____
\$ _____	Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b.	\$ _____
\$ _____	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.	\$ _____
\$ _____	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.	\$ _____
\$ _____	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.	\$ _____
\$ _____	Other untaxed income not reported, such as worker's 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.	\$ _____
\$ _____	Money received , or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$ _____

\$ Student
TOTAL

Parent TOTAL \$