



# 2007-2008 Verification Worksheet

## Federal Student Aid Programs

**Independent**

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 spouse's, if you are married) 2006 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, Oswego may need to make corrections electronically or by using your Student Air 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 spouse's financial documents (signed Federal income tax forms, W-2 forms, etc.).
2. Fill in and sign the worksheet, both you and your spouse.
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 household**, include:

- yourself and your spouse if you have one, and
- your children, if you will provide more than half of their support from July 1, 2007 through June 30, 2008, and
- 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, 2007 through June 30, 2008.

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, 2007 and June 30, 2008, 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
<i>Martha Jones (example)</i>	<i>24</i>	<i>Wife</i>	<i>City University</i>
		Self	

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

1. Check one box only. Tax returns include the 2006 IRS Form 1040, 1040A, 1040EZ, TeleFile Tax Record, 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 2006 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See worksheets A&B of the Free Application for Federal Student Aid)

Sources of Untaxed Income	2006 Amount	Sources of Untaxed Income	2006 Amount
a. Child Support	\$	d.	\$
b. Social Security (non-taxed)	\$	e.	\$
c. Welfare (including TANF)	\$	f.	\$

3. If you did not file and are not required to file a 2006 Federal income tax return, list below your employer(s) and any income received in 2006 (use the W-2 form or other earnings statements if available).

Sources	2006 Amount
	\$
	\$
	\$

**D. Spouse's Tax Forms and Income Information (if student is married)**

1. Check one box only. Tax returns include the 2006 IRS Form 1040, 1040A, 1040EZ, TeleFile Tax Record, a tax return from Puerto Rico or a foreign income tax return. If your spouse 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 if you and your spouse did or will file a joint return. **ALSO ATTACH COPIES OF W-2 FORMS**
- Check and attach signed tax return if your spouse filed a separate return.
- Check and complete: signed tax return will be submitted to the school by \_\_\_\_\_ (date).
- Check here if your spouse will not file and are not required to file a 2006 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See worksheets A&B of the Free Application for Federal Student Aid)

Sources of Untaxed Income	2006 Amount	Sources of Untaxed Income	2006 Amount
a. Child Support	\$	d.	\$
b. Social Security (non-taxed)	\$	e.	\$
c. Welfare (including TANF)	\$	f.	\$

3. If your spouse did not file and are not required to file a 2006 Federal income tax return, list below your spouse's employer(s) and any income they received in 2006 (use the W-2 form or other earnings statements if available).

Sources	2006 Amount
	\$
	\$
	\$

**E. Sign this Worksheet**

By signing this worksheet, we certify that all the information reported on it is complete and correct.

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

\_\_\_\_\_  
Student

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse

\_\_\_\_\_  
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 Worksheets:

### Worksheet A

Student (Question 40)	Calendar Year 2006 – Report Annual Amounts
\$ _____	Earned income credit from IRS Form 1040-line 66a; 1040A-line 40a; 1040EZ-line 8a; or Telefile-line L.
\$ _____	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, for all household members as reported in question 90 (or 66 for your parents), that were not taxed (such as SSI).
\$ <input type="text"/>	<b>Student/Spouse TOTAL</b>

### Worksheet B

Student (Question 41)	Calendar Year 2006 – Report Annual Amounts
\$ _____	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 <b>received</b> for <b>all children</b> . Don't include foster care or adoption payments.
\$ _____	Tax exempt interest income from IRS Form 1040-line 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 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.
\$ _____	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 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.
\$ _____	Any other untaxed income or benefits not reported elsewhere on Worksheets A and B, such as worker's compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Tax filers only: report combat pay not included in AGI (FAFSA questions 35 and 79). <b>Don't include</b> student aid, Workforce Investment Act educational benefits, combat pay if you are not a tax filer or benefits from flexible spending arrangements, e.g., cafeteria plans.
\$ _____	Money <b>received</b> , or paid on your behalf (e.g., bills), not reported elsewhere on this form.
\$ <input type="text"/>	<b>Student/Spouse TOTAL</b>

### Worksheet C

Student (Question 42)	Calendar Year 2006
\$ _____	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 or 1040A-line 31.
\$ _____	Child support you <b>paid</b> because of divorce or separation or as a result of a legal requirement. Do not include support for children in your household, as reported in question 90.
\$ _____	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 adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.
\$ <input type="text"/>	<b>Student/Spouse TOTAL</b>