



2008-2009 Verification Worksheet

Federal Student Aid Programs

Your application was selected for review in a process called "verification." In this process, LSSU will be comparing information from your application with signed copies of your 2007 Federal Income Tax forms (and your spouse's, if you are married) 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 Student Aid. Please try to complete the verification as soon as possible so that your financial aid won't be delayed. You must provide the required documents before the end of the academic year or before you drop below half-time status, whichever comes first. **Your financial aid will not be processed until verification requirements are complete.** LSSU must review the requested information, under the Federal Financial Aid Program rules and make any necessary corrections (CFR Title 34, Part 668).

What you should do:

1. Collect your (and your spouse's) financial documents (signed and dated Federal Income Tax forms, W-2, etc.).
2. Contact the Financial Aid Office if you have questions about completing this worksheet.
3. **Complete each section and sign this worksheet** – you (and your spouse).
4. Submit the completed worksheet, tax forms, and any other documents to the Financial Aid Office.
5. The Financial Aid Office will complete the verification and make any necessary corrections.
6. You will receive a corrected Student Aid Report two weeks after corrections are completed.

A. Student Information

Reminder: Do not leave any questions blank!

Last Name	First Name	M.I.	Student I.D. Number
Address (include apt. #)			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 provide more than half of their support, 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, 2008 through June 30, 2009.

Write the names of all household members. Also write in the name of the college for any household member who will be attending college at least half time between July 1, 2008 and June 30, 2009, and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	If attending College (enrolled at least 1/2 time)	# of Credits per Semester	Dependent Day Care Expenses ? Y/N
Example: <i>Mark Swanson</i>	<i>24</i>	<i>Spouse</i>	<i>Western University</i>	<i>16</i>	<i>Y</i>
		Self			

C. Tax Forms and Untaxed Income Information

Independent Student

- You and your spouse signed **2007 Federal Income Tax** returns are attached or have been submitted to LSSU.
- The signed tax returns will be mailed to the school by _____ (date).
Tax returns include the Federal 2007 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 an RTFTP printout or Letter 1722 from the Internal Revenue Service (1-800-829-1040) or a copy from your tax preparer.
- You did not file and are not required to file a 2007 U.S. Income Tax Return. *Report earnings from work below.*
- Your spouse did not file and is not required to file a 2007 U.S. Income Tax Return.

Income (wages, salaries, tips, combat pay and income reported on your W2)

Student Income from work (other than Federal & State taxable work study earnings) \$ _____

Student & Spouse Federal & State taxable work study earnings \$ _____

Spouse Income from work \$ _____

Other Income \$ _____

Veteran's monthly educational benefit anticipated for 2008; per month \$ _____

In 2007, did you or anyone in your household receive benefits from any of these **federal benefit programs**?

- Supplemental Security Income – Report total received for all family members for year \$ _____
- Temporary Assistance for Needy Families (TANF) – Report total for all family members \$ _____
- Food Stamps Free or Reduced Price School Lunch WIC

In 2007, report the total Social Security benefits received for the household, including student \$ _____

Allowances and payments

Child Support received for all family members in 2007 \$ _____

Alimony received in 2007 \$ _____

Withholding information from W2 : Box 12a through 12d, codes D,E,F,G,H,and S. \$ _____

Tribal allowance received in 2007 \$ _____

Veteran's non-educational benefits received in 2007 \$ _____

Housing, food and other living allowances (for military, clergy, etc.) \$ _____

Untaxed portions of IRA distributions from IRS Form 1040 – lines (15a minus 15b)
Or 1040A – lines (11a minus 11b). Exclude rollovers. If negative, enter zero \$ _____

Untaxed portions of pensions from IRS Form 1040 – lines (16a minus 16b)
Or 1040A - lines (12a minus 12b). Exclude rollovers. If negative, enter zero. \$ _____

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

Any other untaxed income benefits not reported elsewhere on this form,
including in-kind support (value of food and/or shelter) from others \$ _____

Tax credit verification

Earned Income Credit from IRS Form 1040 – line 66a; 1040A – line 40a \$ _____

Additional child tax credit from IRS Form 1040 – line 68 or 1040A – line 41 \$ _____

Credit for federal tax on special fuels from IRS Form 4136 – line 17 (non-farmer) \$ _____

Foreign income exclusion from IRS Form 2555 – line 45 or 2555EZ – line 18 \$ _____

Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040
Line 49 or 1040A – line 31 \$ _____

Taxable student grant and scholarship aid reported on IRS Form 1040 \$ _____

Any other money received or paid on student's behalf not reported elsewhere
on this form \$ _____

D. Sign this Worksheet

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

Student _____ Date _____

Spouse _____ Date _____

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

RETURN FORM TO:
Lake Superior State University
Financial Aid Office
650 West Easterday Avenue
Sault Ste. Marie, MI 49783-1699
Phone: 906-635-2678
Fax: 906-635-6669

Reminder: Do not leave any questions blank!