



# 2009-2010 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 2008 Federal Income Tax forms (and your spouse's, if you are married) or with W-2 forms or other financial documents. The law states 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 happens next:

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 to your FAFSA.
6. You will receive an Official Offer of Award once verification is completed.

### A. Student Information

**Reminder: Do not leave any questions blank!  
Use zeros or line through items if not applicable.**

Last Name	First Name	M.I.	Student ID Number
Permanent Address (include apt. #)			Date of Birth
City	State	Zip Code	Home Phone Number Cell Phone Number (include area codes)

### 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, 2009 through June 30, 2010.

**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, 2009 and June 30, 2010, 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 ½ 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 **2008 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 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 free 4506-T Transcript of your Tax Return from the Internal Revenue Service (1-800-829-1040). Free transcripts do not include schedules and may not be sufficient to verify tax information if income is from self-employment.*
- You did not file and are not required to file a 2008 U.S. Income Tax Return. *Report earnings from work below.*
- Your spouse did not file and is not required to file a 2008 U.S. Income Tax Return.

### Income Verification

#### Wages, Salaries, Tips, and Other Income

Student Income from work \$ \_\_\_\_\_ Does this figure include college work-study earnings?:  No  Yes \$ \_\_\_\_\_

Spouse Income from work \$ \_\_\_\_\_

Business Income/Loss \$ \_\_\_\_\_ (Student) \$ \_\_\_\_\_ (Spouse) Must include Schedule C.

#### Additional Financial Information

Taxed Social Security Benefits: Included on Federal IRS Form 1040 line 20b or 1040A – line 14b \$ \_\_\_\_\_

Education credits: (Hope and Lifetime Learning tax credits): IRS Form 1040 line 50 or 1040A – line 31 \$ \_\_\_\_\_

Child support paid: Funds paid outside of the home because of divorce or legal requirement \$ \_\_\_\_\_

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

Taxable combat pay or special combat pay: Enter only amount included in AGI. \$ \_\_\_\_\_

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

#### Untaxed Income

Payments to Tax Deferred Pension or Savings Plan:

See W2, Box 12a through 12d, codes D,E,F,G,H,and S \$ \_\_\_\_\_

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

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

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

Child support received for all family members in 2008 \$ \_\_\_\_\_

Alimony received by parent in 2008 \$ \_\_\_\_\_

Tribal, Military, or Governmental allowances received in 2008 \$ \_\_\_\_\_

Veteran's non-educational benefits received in 2008 \$ \_\_\_\_\_

Housing, food and other living allowances paid to members of military, clergy, etc. \$ \_\_\_\_\_

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

Veteran's monthly educational benefit anticipated for 2009; per month (including any kickers) \$ \_\_\_\_\_

#### In 2007 or 2008, did you or anyone in your household receive benefits from any of these federal benefit programs?

- Supplemental Security Income (not Social Security; SSI is to help the aged, blind, and/or disabled)
- Temporary Assistance for Needy Families (TANF)  Food Stamps  WIC  Free/Reduced School Lunch

#### As of today, are you or your spouse a dislocated worker? (If yes, you MUST submit proof to the Financial Aid Office) Yes No

In general, a person may be considered a dislocated worker if he or she is receiving unemployment benefits due to being laid off or losing a job and is unlikely to return to a previous occupation (EXCLUDES SEASONAL WORKERS); has been laid off or received a lay-off notice from a job; was self-employed but is now unemployed due to economic conditions or natural disaster; or is a displaced homemaker. A displaced homemaker is generally a person who previously provided unpaid services to the family (e.g., a stay-at-home mom or dad), is no longer supported by the husband or wife, is unemployed or underemployed, and is having trouble finding or upgrading employment.

## 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 \_\_\_\_\_

**Reminder: Do not leave any questions blank!**  
Use zeros or line through items if not applicable

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**