



2010-2011 Verification Worksheet Federal Student Aid Programs

Dependent Student

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 2009 Federal Income Tax forms and your parent(s)', 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 parent(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 at least one parent.
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 (include area codes)
			Cell Phone Number (include area codes)

B. Family Information

List the people in your parents' household that meet the following criteria:

- **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 (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, 2010 through June 30, 2011.

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, 2010 and June 30, 2011, 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 <small>(must be enrolled at least 1/2 time)</small>	# of Credits per Semester
Example: <i>Mary Johnson</i>	<i>20</i>	<i>Sister</i>	<i>Lake Superior State</i>	<i>12</i>
		Self		
		Parent/Stepparent	*	
		Parent/Stepparent	*	

*The FAFSA no longer allows parents to be counted in the number of college students in the family. Lake Superior State will consider adding your parent(s) to the number of household members in college if they are attending at least half time in an undergraduate degree and a third party, such as an employer or government agency does **not** pay their tuition. You must include proof of their enrollment and tuition expense for special consideration.

C. Tax Forms and Untaxed Income Information

Dependent Student

- You and your parent(s) signed **2009 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 2009 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 2009 U.S. Income Tax Return. *Report earnings from work below.*
- Your parent(s) did not file and is not required to file a 2009 U.S. Income Tax Return.

Income Verification

Reminder: Do not leave any questions blank!

Wages, Salaries, Tips, and Other Income

Student Income from work \$ _____ Does this figure include college work-study earnings?: No Yes \$ _____
 Parent(s) Income from work \$ _____ (father/stepfather) \$ _____ (mother/stepmother)
 Business Income/Loss* \$ _____ (father/stepfather) \$ _____ (mother/stepmother)

*Business Owners must include Schedule C.

	Student	Parent(s)
Taxable student grant and scholarship aid reported on IRS Form 1040 as wages	\$ _____	\$ _____

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 49 or 1040A – line 31	\$ _____	\$ _____
Child support <u>paid</u> : Funds paid outside of the home because of divorce or legal requirement	\$ _____	\$ _____

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 2009 \$ _____ \$ _____

Alimony received by parent in 2009 \$ _____ \$ _____

Tribal, Military or Governmental allowances received in 2009 \$ _____ \$ _____

Veteran's non-educational benefits received in 2009* \$ _____ \$ _____

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 \$ _____ \$ _____

*Please attach a copy of the W2 form used to answer this question

In 2008 or 2009, 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

If your parent is a dislocated worker and/or has experienced a recent income loss, you may be eligible for a re-evaluation for special circumstances. You can review the requirements on our website at www.lssu.edu/finaid, Forms for 2010-11, or print the form using this link: <http://www.lssu.edu/finaid/pdfs/2010-11SpecialCircumstanceRequestforDependentStudent>.

D. 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

Parent (one parent must sign this form)

Date

**Reminder: Do not leave any questions blank!
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Return to: Lake Superior State University
 FINANCIAL AID OFFICE
 650 West Easterday Avenue
 Sault Ste. Marie, MI 49783
 Phone: 906-635-2678
 Fax: 906-635-6669