

2011-2012 Verification Worksheet

Federal Student Aid Programs



* V E R *

Your application was selected for review in a process called "Verification." In the process, we will be comparing information from your application with signed copies of 2010 Federal tax forms, or with W-2 forms, and other supporting documents. The law says we have the right to ask for this information before awarding Federal aid. If there are differences between your application information and your financial documents, we will make the corrections. 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.

ID #

A _____

What you should do

1. Collect yours, your spouse (if applicable) and your parent(s)' (if applicable) financial documents (signed Federal income tax forms, W-2 forms, etc.)
2. Contact the financial aid office at (845)341-4190 if you have questions about completing this worksheet.
3. Complete and sign the worksheet—you and at least one parent (if applicable).
4. Submit the completed worksheet, signed photocopies of tax forms, and any other requested documents to the financial aid office.

A. STUDENT INFORMATION

Last Name: _____ First Name: _____ M.I. _____ Soc. Sec No. _____

Date of Birth: ____/____/____ Phone Number (include area code): (____) ____ - ____ E-mail Address: _____

Currently have a Bachelor Degree? YES / NO If yes, please list school _____

B. FAMILY INFORMATION

Write the names of all household members in the spaces(s) below. Also write in the name of the college for any household member, **excluding your parent(s)**, who will be attending at least half time between July 1, 2011 and June 30, 2012, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page. The list of people in your household should include:

- Yourself

Independent Students should also include (if applicable):

- Your spouse
- Your children if you provide more than half of their support from July 1, 2011 through June 30, 2012, even if they do not live with you, 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, 2011 through June 30, 2012.

Dependent Students should also include (if applicable):

- Your parent(s) (including stepparent) even if you don't live with your parents,
- Your parents' other children, even if you don't live with your parent(s), if (a) your parents will provide more than half of their support from July 1, 2011 through June 30, 2012, 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, 2011 through June 30, 2012.

Full Name	Age	Relationship	College
Missy Jones (example)	18	Sister	Central University
		Self	

C. 2010 TAX FORM* INFORMATION

Student / Spouse Filing Status: _____ Filed Individual _____ Joint Tax Return _____ Filed Separate (will need copies of BOTH tax returns)

Parent's Filing Status (if filed): _____ Filed Individual _____ Joint Tax Return _____ Filed Separate (will need copies of BOTH tax returns)

Student Spouse Parent

Attaching a signed copy of the 2010 tax return* and all W-2's (summary not accepted) Tax returns should include (if any) Schedule C, Schedule K and Profit and Loss from Business.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Will not file and are not required to file a 2010 U.S. Income Tax Return. Attach W-2's for wages earned from work, if any.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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*Tax returns include the 2010 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return and all W-2's. If you did not keep a copy of your tax return, request a copy from your tax preparer or request a form 4506T and a W-2 transcript from the Internal Revenue Service 1-800-829-1040



Name: _____

ID# A _____

PROVIDE ANNUAL AMOUNTS**D. 2010 ADDITIONAL INFORMATION All questions MUST be answered; even if a zero.**

	Student Information	Spouse Information	Parent Information
Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31	\$	\$	\$
Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household (as reported in question 93 on the FAFSA). Submit supporting documentation.	\$	\$	\$
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 and scholarship portions of fellowships and assistantships.	\$	\$	\$
Earnings from work under a cooperative education program offered by a college. Submit supporting documentation.	\$	\$	\$

E. 2010 UNTAXED INCOME All questions MUST be answered; even if a zero.**PROVIDE ANNUAL AMOUNTS**

Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on W-2 forms in Boxes 12a, 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 - line 28 + line 32 or 1040A - line 17	\$	\$	\$
Child support received for any of your children. Don't include foster care or adoption payments. Submit supporting documentation.	\$	\$	\$
Tax exempt interest income from IRS Form 1040A - line 8b.	\$	\$	\$
Untaxed portions of IRA distributions from IRS form 1040- lines (15 minus 15b) or 1040A- lines (11a minus 11b). Excluded 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 military, clergy, and others (including cash payments and cash value of benefits) Don't include the value of on-base military housing or the value of basic military allowance for housing. Submit supporting documentation.	\$	\$	\$
Veterans non education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensations (DIC) and/or VA Educational Work-study allowances. Submit supporting documentation.	\$	\$	\$
Other untaxed income not reported in items 44a through 44h, such workers' compensation, disability, etc. Also include the first-time homebuyer tax credit from IRS Form 1040-line 67. Don't include student aid, earned income credit, additional child tax credit, welfare payments, untaxed social security benefits, Supplemental security income, workforce investment act education benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels. Submit supporting documentation.	\$	\$	\$
*Money received (e.g. unreported wages), or paid on your behalf (e.g., bills), not reported elsewhere on this form. Source(s): _____ Submit supporting documentation.	\$	\$	\$

F. ASSET INFORMATION All questions MUST be answered; even if zero.

As of today, what is your total net worth of investments (current value minus debt)? Don't include the home you live in.	\$	\$	\$
As of today, what is your total net worth of Business/Farm - Don't include if 100 or fewer full-time employees?	\$	\$	\$
As of today, what is your total current balance of cash, checking, and savings?	\$	\$	\$

G. SIGN THIS WORKSHEET

Each person signing this worksheet certifies that all the information reported on it is complete and correct. The Student and at least one parent must sign.

Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.Do not mail this worksheet to the Department of Education. Submit this worksheet to the Financial Aid Office at SUNY Orange.
Make sure that tax forms are signed copies ready to submit.

Student: _____ Date: _____ Parent: _____ Date: _____

(if applicable)