

# Lamar University

## Independent 2009-2010 Verification Worksheet

The U.S. Department of Education (DOE) or the Lamar University's Student Financial Aid Office has selected your FAFSA for verification. Once placed in verification, the laws governing the U.S. Department of Education say we have the right to ask you for all information required to complete verification before awarding you Financial Aid. In doing so, we will need to collect several pieces of information. If there are differences between the information you submitted on your FAFSA and the documents you provide for verification, corrections will be submitted to the DOE.

### Step 1: Student Information

[Please type or print all information clearly]

Student Name

Student Identification Number or SSN

**We will not accept any requested verification information until you can provide us with all requested information.**

Any incomplete paperwork will be returned to you in its entirety. If you do not have a copy of your tax return or W-2(s), you can call the IRS at **1-800-829-1040** and request a tax transcript and W-2 transcript(s) or complete the IRS [Form 4506-T](#) and submit it to the IRS.

### Step 2: Minimum paperwork required

1. This verification form must be completed along with the information requested in Steps 2 – 4.
2. A copy of your **SIGNED** 2008 U.S. Income Tax Return 1040 / 1040A / 1040EZ and **all W-2s/1099s**, or a **SIGNED** IRS transcript with **all related schedules** and **all W-2s/1099s**. **\*Tax preparers' recaps will not be acceptable.**
3. If your total household income is less than the equivalent of \$3,000 per household member in 2008 or if you did not file a tax return in 2008, you **must complete** a "[Minimum Income Statement](#)". If you did not file a tax return in 2008, the completed "[Minimum Income Statement](#)" must be accompanied by a [Certification of Non Tax Filing](#)) or a **SIGNED** IRS Transcript showing you did not file a 2008 Income Tax Return.
4. Additional paperwork may be required upon further review.

### Step 3: Family Information

Check your marital status as of the date this form is completed:

- |                                            |                                   |
|--------------------------------------------|-----------------------------------|
| <input type="checkbox"/> married/remarried | <input type="checkbox"/> divorced |
| <input type="checkbox"/> separated         | <input type="checkbox"/> single   |
| <input type="checkbox"/> widowed           |                                   |

List the people in your household including:

- **yourself, and your spouse** (if you have one), and
- **your children, and step-children** (if you have them) if you will provide more than half of their support from July 1, 2009 through June 30, 2010 (if these children are in the household because of a court ordered Guardianship, **proof of Guardianship will be required**), or (b) the children who would be required to provide parental information when applying for Federal Student Aid.

Write the names of all family members. Also write in the name of the college for any family member who is planning to attend college at least half-time between July 1, 2009 and June 30, 2010, 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
		Self	Lamar University

If there are children under the age of 18 listed in your household above and were not claimed on your tax return, you must complete the [Affidavit of Household Size](#).

**PLEASE COMPLETE BOTH FRONT AND BACK PAGE**

## Step 4: Tax Information

Student's Tax Information		Spouse's Tax Information	
<input type="checkbox"/>	I did or will file a 2008 Income Tax Return	<input type="checkbox"/>	I did or will file a 2008 Income Tax Return
<input type="checkbox"/>	I worked but did not and will not file a 2008 Income Tax Return**	<input type="checkbox"/>	I worked but did not and will not file a 2008 Income Tax Return**
<input type="checkbox"/>	I did not work and did not/will not file a 2008 Income Tax Return	<input type="checkbox"/>	I did not work and did not/will not file a 2008 Income Tax Return

\* Tax preparers' recaps will not be accepted.

\*\*If you marked one of these you **WILL** have to submit a Certification of Non Tax Filing letter that must be notarized.

\*\*\*If you filed a 2008 foreign tax return, a tax return with Puerto Rico, another U.S. territory (e.g. Guam, American Samoa, the U.S. Virgin Islands, Swain's Island, or the Northern Marianas Islands) or one of the freely associated states (i.e. the Republic of Palau, the Republic of the Marshall Islands, the Federated States of Micronesia), use the information from that return to fill out this form.

\*\*\*\*If you filed a foreign return, convert all figures to U.S. dollars, using the exchange rate that is in effect today. To view the daily exchange rate, go to [www.federalreserve.gov/releases/h10/update](http://www.federalreserve.gov/releases/h10/update).

**Both the student and spouse must list the yearly amount of any untaxed income received in 2008. (Be sure to enter zeros if no funds were received.) (Refer to questions 46 and 47 of the FAFSA).**

Calendar Year 2008		
Student	FAFSA Question 47: Report Annual Amounts	Spouse
\$	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.	\$
\$	Child support received for all children during the 2008 year. Do not include foster care or adoption payments. <b>Verification from the Attorney General's office or a divorce decree is required, which either one must be signed by parent; or a signed &amp; notarized statement from the parent who provided the support showing the amount of child support provided.</b>	\$
\$	<b>IF YOU WERE IN THE MILITARY</b> and received BAH and/or BAS assistance, you must report the total amount received in 2008. <b>(Documentation Required).</b>	\$
\$	Housing, food, and other living allowances paid to you as a member of the clergy, and others (including cash payments and cash value of benefits). <b>(Documentation Required).</b>	\$
\$	Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. <b>(Documentation Required).</b>	\$
\$	Other untaxed income or benefits not reported elsewhere such as worker's compensation or disability benefits, etc <b>(documentation required)</b> . Don't include student aid, earned income tax credit, child tax credit, welfare payments, untaxed Social Security benefits, Workforce Investment Act educational benefits, combat pay (if your parents are not tax filers), benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels. <b>tax filers must report combat pay NOT included in AGI.</b>	\$
\$	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$
Student	FAFSA Question 46: Report Annual Amounts	Spouse
\$	Child support paid because of divorce or separation. <b>Verification from the Attorney General's office or a divorce decree is required, either one must be signed by parent; or a signed &amp; notarized statement from the parent who receives the support showing the amount of child support provided.</b> Do not include support for children in your household, as reported in question 90 of the FAFSA.	\$
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Combat pay is reported on the W-2 in Box 12, Code Q.	\$

## Step 5: Sign this Worksheet:

By signing this worksheet I certify that all the information reported on this worksheet is complete and correct. I also give my consent for Lamar University's Student Financial Aid Office to make any required corrections in order to process my financial aid.

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

\_\_\_\_\_  
Student Signature (required)

\_\_\_\_\_  
Date