

## 2011-2012 Verification Worksheet

Federal Student Aid Programs

Your application was selected for review in a process called "Verification." In this process, your school will be comparing 2010 federal tax forms (and your spouse's if you are married, or parents if you are considered dependent for federal aid purposes). The law says we have the right to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, you may need to send in corrections on your Student Aid Report (SAR) and have a new SAR processed. Try to complete verification as soon as possible, so that your financial aid won't be delayed.

### What should you do?

1. Collect your (and your parent's or spouse's financial documents- signed Federal Income Tax forms, W-2s, 1099s, etc.)
2. Talk to your financial aid administrator if you have questions about completing this worksheet.
3. Complete this **2-sided worksheet**, then sign and date it.
4. Mail the completed worksheet, tax forms, and any other documentation to your financial aid administrator.
5. Your financial aid administrator will compare information on these documents and make corrections if necessary.

\*\*Your school must review the requested information, under the financial aid program rule (34 CFR, Part 668)\*\*

### **A. Student Information**

Last Name	First	M.I.	Social Security No.
Address (include apt #)			Date of Birth
City	State	Zip Code	Phone Number (include area code)

### **B. Family Information**

**Independent Students:** List the people in your household. Include (a) yourself, your spouse if married; (b) your children, if you provide more than half of their support from July 1, 2011 through June 30, 2012; and (c) any 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:** List the people in your parent(s) household. Include (a) yourself, your parent(s) you live with (include stepparent); (b) your parent(s)' other children, even if they don't live with your parent(s), if (1) your parent(s) provide more than half of their support from July 1, 2011 through June 30, 2012 or (2) if they would be required to give parental information when applying for Federal student aid; and (c) any other people if they now live with your parent(s), and your parent(s) provided 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.

**Write the names, ages, and relationship (to you) of all family 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, 2011 and June 30, 2012, and will be enrolled in a degree diploma, or certificate program. **Do not include college information for parent(s).** If you need more space, attach a separate sheet.

Full Name	Age	Relationship	College
Example: Martha Jones	19	self	SMCM

### **C. Sign Worksheet**

By signing this **2-sided** worksheet I (We) certify that all the information reported on this worksheet is complete and correct. If dependent, at least one parent must sign. **WARNING:** If you purposely give false or misleading information on this worksheet you may be fined, be sentenced to jail or both.

Student's signature	Date	Parent's signature (Dependent Student's only)	Date
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Return completed form to: **St. Mary's College of Maryland, Office of Financial Aid, 18952 East Fisher Rd., St. Mary's City, MD 20686**

**D. Tax Forms and Income Information**

1. All tax filers must submit a **signed** copy of all 2010 Federal Income Tax returns (includes the 1040, 1040A, 1040EZ, tax return from Puerto Rico or a foreign income tax return) and supporting documentation. Check the line for those who filed.

\_\_\_ You                      \_\_\_ Your spouse                      \_\_\_ Your father / stepfather                      \_\_\_ Your mother /stepmother

2. Check the line for those who worked, but did not file and are not required to file a 2010 Federal Income Tax Return. List below your Employer(s) and any income you received in 2010 (submit W-2, 1099, or other earning statements).

\_\_\_ You                      \_\_\_ Your spouse                      \_\_\_ Your father / stepfather                      \_\_\_ Your mother / stepmother

Name of Employer	Student Amount	Spouse or Parent / Stepparent Amount

3. **REPORT ANNUAL AMOUNTS.** Both Tax Filers and Non-Filers must list any untaxed income received in 2010.

**ENTER ZERO FOR EACH LINE WHERE NO FUNDS WERE RECEIVED**

Student (spouse)	2010 Additional Financial Information	Parent (s)
\$ _____	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 (or your parents') household, as reported in question 96 (or questions 75 for your parents).	\$ _____
\$ _____	Taxable earnings from need-based employment programs, such as Federal Work Study and need-based employment portions of fellowships and assistantships.	\$ _____
\$ _____	Grant and scholarship aid <b>reported to the IRS</b> in your (or your parents') adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	\$ _____
\$ _____	Combat pay or special combat pay, (Only enter the amount that was taxable and included in the Adjusted gross income. <b>Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).</b>	\$ _____

**2010 Untaxed Income**

\$ _____	Payments to tax-deferred pension and savings plan (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Box 12a through 12d, codes D, E, F, G, H, and S.	\$ _____
\$ _____	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040-line 28 + line 32 or 1040A-line 17.	\$ _____
\$ _____	Child support you received for all children. Don't include foster care of adoption payments.	\$ _____
\$ _____	Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b.	\$ _____
\$ _____	Untaxed portions of IRA distributions from IRS Form 1040-lines (15a minus 15b) or 1040A-lines (11a minus 11b). Exclude 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.	\$ _____
\$ _____	Credit for federal tax on special fuels from IRS Form 4136-line 20 (nonfarmers only)	\$ _____
\$ _____	Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).	\$ _____
\$ _____	Veterans' noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work Study allowances.	\$ _____
\$ _____	Other untaxed income not reported such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. <b>Don't include</b> student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay benefits from flexible spending arrangements (e.g. cafeteria plans) foreign income exclusion or credit for federal tax on special fuels.	\$ _____
\$ _____	Money received, or paid on your behalf (e.g. bills), not reported elsewhere on this form.	XXXXXXXXXX