



2008 - 2009 INDEPENDENT VERIFICATION FORM

STUDENT NAME: _____ SPU ID: _____

Your application was selected for review in a process called "Verification". In this process, SPU will be comparing information from your FAFSA with signed copies of your 2007 Federal tax return, your spouses' 2007 Federal tax return, or W-2 forms or any other financial documents. If there are differences between your application information and your financial documents, SPU may need to make corrections to your FAFSA electronically. Please complete this verification form and submit it to Student Financial Services as soon as possible, to avoid delaying your financial aid. SPU must review the requested information, under the financial aid program regulations (34 CFR, Part 668).

What you should do

- 1. Collect your (and your spouse's) financial documents (signed Federal income tax returns, W-2 forms, etc.).
2. Complete both sides of this worksheet and sign it. Please do not leave any blanks; if the question does not apply enter N/A or 0.
3. Submit the completed worksheet, tax forms, and any other documents needed to Student Financial Services.

A. Family Information

List the people you (and your spouse) will support between July 1, 2008 and June 30, 2009. Attach additional pages if necessary. Include:

- Yourself
• Your spouse (if married)
• Your children if you will provide more than half their support between July 1, 2008 and June 30, 2009.
• Other people if they live with you, you provide more than half their support and you will continue to provide this support between July 1, 2008 and June 30, 2009 (including money, gifts, housing, medical and dental care, college costs, etc.)

Table with 4 columns: Name, Relationship to Applicant, Age, 2008 - 2009 College Name (if applicable). The first row contains 'Self' and 'SPU'.

B. Tax Forms and Income Information (all applicants)

1. Tax Forms

Student: Check only one box below. Tax returns include the 2007 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 your tax return, request a copy from the tax preparer or an Internal Revenue Service form that lists tax account information (available at: 1(800) 829-1040 or http://www.irs.gov).

- Box for signed tax return attached.
Box for did not/will not file and are not required to file a 2007 tax return. If so, you must visit http://www.spu.edu/sfs and click on Financial Aid Documents to obtain a Student (Spouse) Non-Filer Form to complete and return.

Spouse: Check only one box below. Tax returns include the 2007 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 your tax return, request a copy from the tax preparer or an Internal Revenue Service form that lists tax account information (available at: 1(800) 829-1040 or http://www.irs.gov).

- Box for signed tax return attached.
Box for did not/will not file and are not required to file a 2007 tax return. If so, you must visit http://www.spu.edu/sfs and click on Financial Aid Documents to obtain a Student (Spouse) Non-Filer Form to complete and return.

2. Funds received for child support and other untaxed income. (See worksheets A&B of the FAFSA)

| <i>Do not leave any blanks; if the answer is zero or does not apply enter 0.</i> | Student | Spouse |
|--|----------------|---------------|
| Welfare benefits, including Temporary Assistance for Needy Families (TANF). Do not include food stamps or subsidized housing. | | |
| Untaxed Social Security benefits received for all household members. | | |
| 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. Do not include foster care or adoption payments. | | |
| Foreign income exclusion from IRS Form 2555 – line 45 or 2555EZ – line 18. | | |
| Credit for federal tax on special fuels from IRS Form 4136 – line 17 – non-farmers only. | | |
| Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits or the amount reported on the W-2 Form, box 14). | | |
| Veterans' non-education benefits such as Disability, Death Pension, or Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances. | | |
| Any other untaxed income or benefits not reported, such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Tax filers only: report combat pay not included in AGI (FAFSA questions 35 and 79). Do not include student aid, Workforce Investment Act educational benefits, or benefits from flexible spending arrangements (e.g., cafeteria plans). | | |
| Money received or paid on your behalf (e.g., bills), not reported elsewhere on this form. (Support includes money, gifts, and housing, food, clothing, car payments or expenses, medical and dental care, and college costs paid for on your behalf.) | | |
| TOTAL | | |

C. Income Exclusions (Worksheet C)

This section is to verify the figures entered on "Worksheet C", line 42 Student/Spouse, on your 2008 - 2009 Free Application for Federal Student Aid (FAFSA). Please list the amounts earned or paid in each category.

| <i>Do not leave any blanks; if the answer is zero or does not apply enter 0.</i> | Student | Spouse |
|--|----------------|---------------|
| Child support paid because of divorce or separation or as a result of a legal requirement. Do not include support for children in your (or your spouses') household. | | |
| 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 (or your spouses') adjusted gross income on your tax return(s). Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships. | | |

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 prison, or both.

| | | | |
|----------------------------------|------|-------|-------|
| Student Signature | Date | Phone | Email |
| Spouse Signature (if applicable) | Date | Phone | Email |