

How to Complete Your Independent Verification Worksheet



Spire ID#: _____

Your Application for Financial Aid was selected for Verification, a required federal process. In this process, the University will compare information from your Free Application for Federal Student Aid (FAFSA) to signed copies of your and your spouse's (if married) 2007 Federal tax forms and/or other financial documents. If changes result from this review, you will receive a new Student Aid Report (SAR). The University is required to review this information under the financial aid program rules (CFR Title 34, Part 668). **We cannot evaluate your eligibility for federal aid until you have submitted all required verification documents. If any information is left blank we will assume zero (unless otherwise indicated on you or your parent(s) federal 2007 tax return, or if you are a non-filer). Failure to submit all required paperwork will delay the processing of your financial aid award.**

Note that any financial aid awarded prior to verification is tentative and subject to final approval.

The Financial Aid Office has the right after reviewing your verification information to change or cancel your awards. Changes in funding, administrative/technical errors, changes in application information, enrollment status or reclassification in residency will affect your financial aid awards and may result in a revised award.

Carefully read the information below before completing the Independent Verification Form

Section A: Complete the student information.

Section B: List every person living in your household, their relationship to you and if attending college list the college or university name.

Section C: If you and your spouse (if married) filed tax return(s), check the appropriate box and include signed copies of all Federal tax returns with this form.

If you or your spouse (if married) did not file tax returns, check the appropriate box and complete the earnings information. If you or your spouse (if married) did not have earnings, please explain living arrangements or how expenses are paid for.

Section D: If when you filed your Free Application for Federal Student Aid (FAFSA) you completed worksheet A, B or C, provide the same information on Section D.

Section E: If you or your parent(s) own a rental property, a second home or investment property, check the appropriate box and provide the Real Estate information requested.

Section F: You and your spouse (if married) must sign and date the verification worksheet.

Once completed, include signed copies of required federal tax forms with the verification worksheet and return to:

Financial Aid Services
255 Whitmore Administration Building
181 Presidents Drive
Amherst, MA 01003-9313

Failure to submit all required paperwork will delay the processing of your financial aid award.



Verification Worksheet

for Independent Students

2008-2009



UNIVERSITY OF
Massachusetts
Amherst

Financial Aid Services

Spire ID#: _____

A. STUDENT INFORMATION

Last Name _____ First Name _____ Middle Initial _____			Date of Birth _____ / _____ / _____ MM DD YY
Permanent Address _____ (include apt. #)			Social Security Number _____ - _____ - _____
City _____	State _____	Zip Code _____	Permanent Telephone # () _____
Email Address _____			Cell Phone Number () _____

B. FAMILY INFORMATION

List the people in your household, include:

- Yourself, and your spouse (if you are married).
- Your children, if you will provide more than half of their support from July 1, 2008 through June 30, 2009.
- 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, 2008 through June 30, 2009.

Also, write in the name of the college for any household member (EXCLUDING PARENTS), who will be enrolled in a degree or certificate program at least half-time between July 1, 2008 and June 30, 2009. If you need more space, attach a separate page.

Name	Age	Relationship to Student	College Attending 2008-2009
		SELF	UMASS/Amherst

C. TAX FORMS AND INCOME INFORMATION

Tax filers must submit signed complete copies of Federal income tax returns (2007 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a translated foreign income tax return) and 2007 **W-2 or earnings statements**. If you did not keep a copy of the tax return, request a Transcript of Tax Return form 4056-T (RTFTP) printout or Letter 1722 from the Internal Revenue Service by calling 1-800-829-1040; or at www.IRS.gov or a copy from your tax preparer. **DO NOT SUBMIT STATE TAX RETURNS.**

<p>STUDENT TAX AND INCOME INFORMATION</p> <p>Please check one box:</p> <p><input type="checkbox"/> A signed 2007 Federal tax return with all schedules and W-2 form(s) are attached.</p> <p><input type="checkbox"/> I will not file and I am not required to file a 2007 U.S. Income Tax Return. Please complete the following:</p> <p>My total income earned during the year 2007 was: \$ _____ Please attach 2007 W-2 or earnings statements</p>	<p>SPOUSE TAX AND INCOME INFORMATION (If the student is married)</p> <p>Please check one box:</p> <p><input type="checkbox"/> A signed 2007 Federal tax return with all schedules and W-2 form(s) are attached.</p> <p><input type="checkbox"/> I will not file and I am not required to file a 2007 U.S. Income Tax Return. Please complete the following:</p> <p>My total income earned during the year 2007 was: \$ _____ Please attach 2007 W-2 or earnings statements</p>
<p>REMEMBER TO SIGN YOUR TAX FORMS</p>	

Financial Aid Services | 255 Whitmore Administration Building | 181 Presidents Drive | Amherst | MA | 01003-9313 | Telephone 413.545.9420 | TDD 413.545.0801 | Fax 413.545.1700



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Verification Worksheet

for Independent Students

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D. OTHER UNTAXED INCOME AND BENEFITS

The following worksheets A, B & C are on the back of the FAFSA and request information about specific categories of income and/or benefits that you or your spouse may have received. **If you reported figures for yourself or your spouse (if married) on questions 40-42 please clarify these figures by completing the worksheets below. If you did not receive any of the income or benefits listed on the worksheets below, please enter zeros for totals. Failure to complete this section will delay the processing of your financial aid award.**

Worksheet A Calendar Year 2007		Student	Spouse
Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps or subsidized housing.		\$	\$
Social Security benefits received for all household members reported in question 90 that were not taxed (such as SSI). Report benefits paid directly to student (or spouse) in the Student/Spouse column.		\$	\$
Worksheet A Total		\$	\$
Worksheet B Calendar Year 2007		Student	Spouse
Payments to tax-deferred pensions 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.		\$	\$
IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040 – total of lines 28 + 32 or 1040A – line 17.		\$	\$
Child support received for all children. Don't include foster care or adoption payments.		\$	\$
Tax exempt interest income from IRS Form 1040 – line 8b or 1040A – line 8b.		\$	\$
Foreign income exclusion from IRS Form 2555 – line 45 or 2555EZ – line 18.		\$	\$
Untaxed portions of IRA distributions from IRS Form 1040 – lines (15a minus 15b) or 1040A – lines (11a minus 11b). Exclude rollovers. If negative enter 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 zero here.		\$	\$
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 benefits).		\$	\$
Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.		\$	\$
Other untaxed income or not reported elsewhere on Worksheets A and B, 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). Don't include student aid, Workforce Investment Act educational benefits, combat pay if you are not a tax filer, 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.		\$	\$
Worksheet B Total		\$	\$
Worksheet C Calendar Year 2007		Student	Spouse
Child Support you paid because of divorce or separation or as a result of legal requirement. Don't include support for children in your household, as reported in question 90.		\$	\$
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 or scholarship portions or fellowships and assistantships.		\$	\$
Worksheet C Total		\$	\$

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