

# Independent Verification Worksheet 2009-2010



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) 2008 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 spouse's (if applicable) federal 2008 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.

## STUDENT INFORMATION

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

## FAMILY INFORMATION

List the people in your household. Including:

- Yourself, and your spouse (if you are married).
- Spouse's federal tax information is necessary if married to the student at the time the FAFSA was completed.
- Your children, if you will provide more than half of their support from July 1, 2009 through June 30, 2010.
- 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, 2009 through June 30, 2010.

Write the names of all household members in the space(s) below. Also write in the names of the college for any household member who will be attending 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.

Name	Age	Relationship to Student	College Attending 2009-2010
		SELF	UMASS/Amherst

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



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### TAX FORMS AND INCOME INFORMATION

- Spouse's federal tax information is necessary if married to the student at the time the FAFSA was completed.
- Acceptable tax forms include: 1040, 1040A, 1040EZ, tax return from Puerto Rico, or translated foreign income tax return.
- If you don't have a copy of your tax return, please contact the IRS at 1-800-829-1040 or www.IRS.gov. A signed transcript of tax return (form 4056-T) or Letter 1722 is acceptable.
- Remember to **SIGN** your tax forms.
- Do **NOT** submit a state tax return.

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STUDENT TAX AND INCOME INFORMATION	SPOUSE TAX AND INCOME INFORMATION (If the student is married)
<p><b>Please check one box:</b></p> <p><input type="checkbox"/> A signed 2008 Federal Tax return with all schedules attached.</p> <p><input type="checkbox"/> I will not file and I am not required to file a 2008 Federal Tax Return. My means of support for 2008 was: _____ _____ (Do not leave this space blank; an explanation is required)</p>	<p><b>Please check one box:</b></p> <p><input type="checkbox"/> A signed 2008 Federal tax return with all schedules attached.</p> <p><input type="checkbox"/> I will not file and I am not required to file a 2008 Federal Tax Return. My means of support for 2008 was: _____ _____ (Do not leave this space blank; an explanation is required)</p>

### REAL ESTATE ASSETS

Please confirm the accuracy of you and/or your spouse's asset information reported on the FAFSA by completing the following section:

List all real estate (not the home currently living in) including rental property, land or land sale contracts, second or vacation homes. DO NOT list the annual income from these assets.

Real Estate Owned by Student:	<input type="checkbox"/> None	<input type="checkbox"/> Yes - Residence	<input type="checkbox"/> Yes - Rental
TYPE		VALUE OF ASSET (not the income)	DEBT
_____		\$ _____	\$ _____
_____		\$ _____	\$ _____
Real Estate Owned by Spouse:	<input type="checkbox"/> None	<input type="checkbox"/> Yes - Residence	<input type="checkbox"/> Yes - Rental
TYPE		VALUE OF ASSET (not the income)	DEBT
_____		\$ _____	\$ _____
_____		\$ _____	\$ _____



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### ADDITIONAL FINANCIAL INFORMATION AND OTHER UNTAXED INCOME

The following questions are from the FAFSA form. If you report figures for yourself or your spouse (if applicable) on questions 46a-46e and 47a-47j please verify these figures by completing the worksheets below. **If you or your spouse did not receive any of the income listed from the questions below, please enter zeros.**

2008 Additional Financial Information		
	Student	Spouse
Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 or 1040A-line 31.	\$	\$
Child support 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 96.	\$	\$
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowship and assistantships.	\$	\$
Student grant and scholarships 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.	\$	\$
Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$	\$
<b>Total</b>	\$	\$
2008 Untaxed Income		
	Student	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 forms in Boxes 12a through 12d, 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 1040-line 17.	\$	\$
Child support received for all children. Don't include foster or 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 pension 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 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 worker's compensation, disability, etc. Don't include 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.	\$	\$
<b>Total</b>	\$	\$

### SIGN THE VERIFICATION FORM

I certify that all information reported to qualify for Federal Aid is complete and correct. I understand that if I purposely give false or misleading information on this worksheet, I may be fined, sentenced to jail, or both.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature (if applicable)

\_\_\_\_\_  
Date

**Note: Failure to submit all required paperwork will delay the processing of and potentially forfeit your receipt of financial aid.**

