



**Financial Aid/Scholarships Department**  
 One University Circle • Turlock, CA 95382  
 Telephone (209) 667-3335 \* Fax# (209) 664-7064  
<http://www.csustan.edu/financialaid>

Name: \_\_\_\_\_

CSUS, ID# \_\_\_\_\_

Date: \_\_\_\_\_

Email: \_\_\_\_\_

## INDEPENDENT VERIFICATION WORKSHEET 2009-2010

Your application for financial aid was selected for review in a process called "Verification." Selected applications are chosen for review, through a selection process approved by the Federal Government. In this process, this school will be comparing information from your application with signed copies of your (and your spouse's) **FEDERAL** income tax forms or with other financial documents. 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, we will send corrections electronically to the Central Processor, to have your information reprocessed.

Collect your (and your spouse's) signed Federal income tax forms and all Form W-2 (wage and tax statements). Complete, sign and return this verification worksheet with the tax forms and all Form W-2 (wage and tax statements) to the address listed above as soon as possible so that your financial aid will not be delayed. **YOU MUST SIGN THIS FORM.** Your financial aid administrator may help you if you have questions.

Your school must review the requested information, under the financial aid program rules (34 CFR, Part 669)).

### A. Student Information

\_\_\_\_\_  
 Last Name                                      First Name                                      M.I.

\_\_\_\_\_  
 Address (Include Apt. No.)

\_\_\_\_\_  
 Date of Birth

\_\_\_\_\_  
 City                                      State                                      Zip Code

\_\_\_\_\_  
 Phone Number (Include Area Code)

### B. Family Information

List the people you (and your spouse) will support between July 1, 2009 and June 30, 2010. Include:

- **Yourself, and your spouse**, if married at the time you completed your Free Application for Federal Student Aid.
- **Your dependent children**, if you will provide more than half of their support from July 1, 2009 through June 30, 2010.
- **Your unborn child**, if the child will be born before July 1, 2010 and you will provide more than half of the child's support.
- **Other people that you will support** only if, they:
  - a) now live with you **and** receive more than half of their support from you, AND
  - b) you 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 who meet the definition above. Also, write in the name of the college for any household member who will be attending college at least half-time between July 1, 2009 and June 30, 2010, and will be enrolled in a degree, diploma, or certificate program. Attach a separate page if you need more space.

Full Name	Age	Relationship	College
<i>Missy Jones (example)</i>	<i>19</i>	<i>Sister</i>	<i>Central University</i>
		Self	

**C. Student's Tax Forms and Income Information (all applicants)****Independent**

1. Check one box only. Tax returns include the 2008 IRS Form 1040, 1040A, 1040 EZ, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of the tax return, request a copy from your tax preparer or request an Internal Revenue Service form that lists tax account information. One of the boxes **MUST** be checked for this form to be accepted.

- Check and attach signed 2008 U. S. Income Tax Return and all Form W-2 (wage and tax statements).  
 Check here if you will not file and are not required to file a 2008 U. S. Income Tax Return.

2. If you did not file and are not required to file a 2008 U. S. Income Tax Return, list below your employer(s) and any income received in 2008. If you had more than two employers in 2008, please list them on a separate sheet of paper. **If no income was earned or if the question does not apply, write in "0". DO NOT USE N/A AS AN ANSWER.**

Sources (Use the W-2 form or other earnings statements.)	2008 Amount
a. Employer (List Employer Name):	\$
b. Other Employer (List Employer Name):	\$

**D. Spouse's Tax Forms and Income Information**

1. Check one box only. Tax returns include the 2008 IRS Form 1040, 1040A, 1040 EZ, a tax return from Puerto Rico or a foreign income tax return. If your parent(s) did not keep a copy of the tax return, request a copy from the tax preparer or request an Internal Revenue Service form that lists tax account information. One of the boxes **MUST** be checked for the form to be accepted.

- Check and attach signed 2008 U. S. Income Tax Return and all Form W-2 (wage and tax statements).  
 Check here if you will not file and are not required to file a 2008 U. S. Income Tax Return.

2. If your spouse did not file and is not required to file a 2008 U. S. Income Tax Return, list below your spouse's employer(s) and any income they received in 2008. If you had more than two employers in 2008, please list them on a separate sheet of paper. **If no income was earned or if the question does not apply, write in "0". DO NOT USE N/A AS AN ANSWER.**

Sources (Use the W-2 form or other earnings statements.)	2008 Amount
a. Employer (List Employer Name):	\$
b. Other Employer (List Employer Name):	\$

**E. Student and Spouse's Untaxed Income and Benefits. If the question does not apply, write in "0".**

Student	Untaxed Income-Calendar Year 2008	Spouse
\$	Child support <b>received</b> for all children. Do not include foster care or adoption payments.	\$
\$	Housing, food, and other living allowances paid to member of the military, clergy, and others (including cash payments and cash value of benefits)	\$
\$	Veterans' non-educational 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 elsewhere, such as workers' compensation, disability, untaxed portions of railroad retirements benefits, Black Lung Benefits, disability, etc. <b>Do not include</b> student aid, earned income credit, additional child tax credit, Social Security payments, welfare payments, 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	xxxxxxx

Student	ADDITIONAL FINANCIAL INFORMATION-Calendar Year 2008	Parent
\$	Child support <b>paid</b> because of divorce or separation or as a result of legal requirement. Do not include support paid for children included in the parents' household size under section B of this Verification Worksheet.	\$
\$	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 parents') adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interested accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	\$

**F. Sign This Worksheet**

By signing this worksheet, we certify that all the information reported on it is complete and correct.

\_\_\_\_\_  
Student Date  
 \_\_\_\_\_  
Spouse Date

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