



# 2009-2010 Verification Worksheet

## Federal Student Aid Programs

**IVW  
10**

**INDEPENDENT**

Your application was selected for review in a process called "Verification". In this process, we will be comparing information from your application with signed copies of your (and your spouse's, if you are married) 2008 Federal tax forms, W-2 forms and 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, corrections must be made.

Complete the verification form and submit it to the Student Financial Services office at OSU Institute of Technology as soon as possible so that your financial aid won't be delayed. Please contact our office should you have any questions at (918) 293-4996.

### What you should do

1. Collect your (and your spouse's) financial documents (signed Federal income tax forms, W-2 forms, etc.)
2. Complete and sign the worksheet.
3. Submit the completed, signed worksheet, signed tax forms, W-2's and any other documents requested.
4. Your financial aid counselor will compare information on this worksheet and any supporting documents with the information you submitted on your application. We may need to make corrections based on our review.

### A. Student Information

Last Name	First Name	M.I.	Social Security Number or CWID
Address (Include apt. #)			Date of birth
City	State	Zip Code	Phone number (include area code)

### B. Family Information

List the people in **your household**, include:

- **Yourself and your spouse** if you have one; and
- **Your children**, if you will provide more than half of their support from July 1, 2009 through June 30, 2010, even if they do not live with you; and
- **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 name of the college for any household member, excluding your parent(s), 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.

Full Name	Age	Relationship	College
<i>Martha Jones (example)</i>	<i>24</i>	<i>Wife</i>	<i>City University</i>
		<b>Self</b>	

**C. Student's (all applicants) and Spouse's (if student is married)  
Tax Forms and Income Information**

STUDENT		SPOUSE
	<b>Check only one box below. Tax returns include the 2008 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 your tax preparer or request an Internal Revenue Service form that lists tax account information at 1-800-829-1040.</b>	
	Check here if you are attaching a <b>SIGNED</b> copy of your tax return.	
	Check here if a signed tax return will be submitted to the school by _____(date).	
	Check here if you will not file and are not required to file a 2008 U.S. Income Tax Return.	
	Check here if your spouse will not file or is not required to file a 2008 U.S. Income Tax Return.	XXXXXXXXXXXX
	<b>Funds received for child support and other untaxed income. (See question 47 of the FAFSA)</b>	
/yr	Payments paid to tax-deferred pension and savings plans. (See W-2 form, box 12 a-d, codes D,E,F,G,H & S).	/yr
/yr	IRS deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans.	/yr
/yr	Child support received for all children. (Do not include foster care or adoption payments.)	/yr
/yr	Tax exempt interest income.	/yr
/yr	Untaxed portions of IRA distributions. (Exclude rollovers. If negative, enter 0.)	/yr
/yr	Untaxed portions of pensions.	/yr
/yr	Housing food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).	/yr
/yr	Veterans non-education benefits such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study Allowances.	/yr
/yr	Other untaxed income not reported, such as workers' compensation, 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.	/yr
/yr	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	/yr
	<b>If you or your spouse did not file and are not required to file a 2008 Federal income tax return, list below your and/or your spouse's employer(s) and any income received in 2008 (use the W-2 form or other earnings statements if available.)</b>	
/yr	Source:	/yr
/yr	Source:	/yr
/yr	Source:	/yr

**D. Sign this Worksheet**

Each person signing this worksheet certifies that all information reported on it is complete and correct. If married, spouse's signature is optional.

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

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

***DON'T FORGET TO SIGN YOUR TAX FORMS***

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

**Return Forms to:  
OSU Institute of Technology  
Student Financial Services  
1801 E. 4<sup>th</sup> St.  
Okmulgee, OK 74447**