

# UNIVERSITY OF WISCONSIN-WHITewater

## 2008-2009 VERIFICATION WORKSHEET - DEPENDENT STUDENT

Your application has been selected for review in a process called "Verification." In this process, the Financial Aid Office will be comparing information from your FAFSA application with signed copies of your and your parent(s)' 2007 Federal tax forms and W-2 forms. If there are differences between your application information and your financial documents, the Financial Aid Office will send corrections electronically.

*Complete this verification form and submit it and any other required documents to the Financial Aid Office as soon as possible so that your financial aid will not be delayed. If you need any help, contact the Financial Aid Office at (262)472-1130.*

### WHAT YOU SHOULD DO:

1. Fill in and sign the worksheets – you and at least one parent.
2. Attach **signed** copies of requested 2007 Federal income tax forms and 2007 W-2 forms.
3. Submit all requested documents to the Financial Aid Office.

### A. Student Information

Last Name	First Name	M.I.	Social Security Number
Address			ID #
City	State	ZIP Code	Phone Number
			Date of Birth

### B. Family Information

List the people in your **parent(s)' household**; INCLUDE:

- Yourself and your parent(s) (including stepparent) even if you don't live with your parents; If your parents are **divorced**, please provide information for the parent you lived with more during the past 12 months. If you lived with both parents equally, include the parent who provided more financial support. *If you need help determining which parent you should list, please contact the Financial Aid Office.*
- Your parents' other children, even if they don't live with your parents, if (a) your parents will provide more than half of their support from July 1, 2008 through June 30, 2009, **or** (b) the children would be required to provide parental information when applying for Federal Student Aid.
- Other people if they now live with your parents, **and** your parents 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.

Write the names of all household members in the spaces below. **Also** write in the name of the **college** for any household member who will be attending college at least half-time between July 1, 2008 and June 30, 2009, and will be enrolled in a degree, diploma, or certificate program. **DO NOT** include **parents** or siblings receiving financial aid as independent students. If you need more space, attach a separate page.

FULL NAME of ALL Household Members	Date of Birth	RELATIONSHIP to student; i.e., mother	COLLEGE
		Self	UW-Whitewater

### C. Tax Forms and Income Information

**Did you or will you file a 2007 Federal income tax return?** Tax returns include the 2007 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return.

**Student:**       YES (follow step a)       NO (follow step b)

**Parent:**       YES (follow step a)       NO (follow step b)

- a.** You must attach **signed** copies of these returns, including all individual W-2 forms, schedules, and attachments. Please provide federal taxes only, not state. If you and/or your parents have not yet filed, but are planning to file, please provide copies of your tax forms once they are completed.
- b.** If you and/or your parents did not file and were **not required** to file a 2007 Federal income tax return, list your employers and other sources of income received in 2007 and the amount of money from each employer and source of income. If you need more space, attach a separate page. Attach copies of any W-2 forms.

STUDENT Employer/Source of Income	2007 Amount
	\$
	\$
	\$
	\$

PARENT Employer/Source of Income	2007 Amount
	\$
	\$
	\$
	\$

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### D. Sign this Worksheet

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

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Date

**At least one parent must sign.**

<p><b>WARNING:</b> If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.</p>
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- If you do not have a copy of your tax return, request a copy from your tax preparer or a tax transcript from the Internal Revenue Service by calling 1-800-829-1040. (Please allow a minimum of 10 days for delivery). Be sure to sign the tax transcript.
  - If you do not have a copy of your W-2 form, contact your employer for a copy.
  - Be sure to **SIGN ALL** tax forms and include **ALL** W-2 forms.
  - If we receive an incomplete set of taxes, a tax return that is not signed, or a worksheet that is not filled out, we will return the incomplete document to you, which can **delay the awarding process**. Please make sure everything is complete **before** submitting your documentation.
  - **SUBMIT ALL DOCUMENTS TO:**  
FINANCIAL AID OFFICE  
800 W MAIN ST  
WHITEWATER, WI 53190-1790  
FAX: (262)472-5655

**University of Wisconsin – Whitewater  
2008-2009 Worksheet A, B, C**

Student Name \_\_\_\_\_

ID#: \_\_\_\_\_

Please report on this worksheet **annual** amounts of untaxed income for calendar year **2007**.

Student/Spouse	<b>Worksheet A</b>	Parent(s)
\$	Earned income credit (EIC) from IRS Form 1040—line 66a; 1040A—line 40a; or 1040EZ—line 8a.	\$
\$	Additional child tax credit from IRS Form 1040—line 68 or 1040A—line 41.	\$
\$	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, that were not taxed (such as SSI). Report benefits paid to parents in the Parents column, and benefits paid directly to student (or spouse) in the Student/Spouse column.	\$
\$	<b>← Total of Worksheet A →</b>	\$

Student/Spouse	<b>Worksheet B</b>	Parent(s)
\$	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	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040—total of line 28 and/or line 32 or 1040A—line 17	\$
\$	Child support you received for <b>all children</b> . 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). <b>Exclude rollovers</b> . If negative, enter a zero here.	\$
\$	Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). <b>Exclude rollovers</b> . If negative, enter a zero here.	\$
\$	Credit for federal tax on special fuels from IRS Form 4136—line 17 (nonfarmers only).	\$
\$	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 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 Adjusted Gross Income (AGI). <b>Don't include</b> 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. <b>List source of untaxed income:</b> _____	\$
\$	Money received, or paid on your behalf, (e.g., bills) not reported elsewhere on this form	XXXXXXXX
\$	<b>← Total of Worksheet B →</b>	\$

Student/Spouse	<b>Worksheet C</b>	Parent(s)
\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040—line 49 or 1040A—line 31	\$
\$	Child support you paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your (or your parents') household, as reported on the FAFSA. List name of each child paying support for: _____	\$
\$	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 (AGI). Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	\$
\$	<b>← Total of Worksheet C →</b>	\$

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

Date \_\_\_\_\_

Parent Signature \_\_\_\_\_

Date \_\_\_\_\_