

AUGUSTA STATE UNIVERSITY

2008-2009 VERIFICATION WORKSHEET

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| FOR OFFICE USE ONLY: | | |
| A | T | EDE |
| FAO Initials | Date | |
| DOB | TRN | |

Your 2008-2009 student aid application has been selected for review in a process called *verification*. **TO RECEIVE STUDENT FINANCIAL AID, YOU MUST FINISH THE VERIFICATION PROCESS.** Please complete all applicable sections of this worksheet and submit it with signed copies of all requested documents to the Financial Aid Office (FAO).

_____ Last Name First Name MI. ID Number (927#)

Section A: Student's 2007 (and spouse's, if married) Income Information:

1. **CHECK THE APPROPRIATE BOX(ES). ACCEPTABLE TAX FORMS INCLUDE THE 2007 IRS FORM 1040, 1040A, 1040EZ, A TAX RETURN FROM PUERTO RICO OR A FOREIGN INCOME TAX RETURN.** If you did not keep or cannot obtain a copy of your tax return, a tax transcript from the Internal Revenue Service. In order to request a tax transcript, you should send in a Form4506-T to the IRS. These forms are available in our office and on our website. In some cases, we may request verification that you did not file a tax return. Also please be advised that our office may request copies of your (and your spouse's) **W-2s**. If you or your spouse served in the military in 2007, you must provide a copy of your (and your spouse's) **Military Leave & Earnings Statement** from December 2007 (or for the last month you or your spouse served).

- _____ Check and attach: **2007 signed** tax return or transcript.
- _____ Check and complete: **2007 signed** tax return or transcript will be mailed to the University by _____(date).
- _____ Check here if you will not and are not required to file a **2007** U.S. Federal Income Tax Return. **SEE #2.**
- _____ Check here if your spouse will not and is not required to file a **2007** U.S. Federal Income Tax Return. **SEE #2.**
- _____ Check here if a signed tax return or transcript has already been submitted to the FAO.

2. If you or your spouse worked but were not required to file a 2007 U.S. Federal Income Tax Return, list your employers and the amount of income that you (and your spouse) earned from work in 2007. Attach copies of your W-2's or other earnings statements. **If you did not work in 2007, write in "Not Employed".**

| EMPLOYER | AMOUNT |
|----------|----------|
| _____ | \$ _____ |
| _____ | \$ _____ |

- 3. If your tax return lists an amount from a pension/annuity or IRA distribution, how much (if any) of this distribution is considered a rollover?
(Form 1040 - Lines 15a or 16a, Form 1040A - Lines 11a or 12a) \$ _____
- 4. Other untaxed income and benefits from Worksheet A on back (Student/Spouse column): \$ _____
- 5. Total from Worksheet B on back (Student/Spouse column): \$ _____
- 6. Total from Worksheet C on back (Student/Spouse column): \$ _____

Section B: Student's Household Size and Number in College:

7. Fill in the information about people whom you will support between July 1, 2008 and June 30, 2009. **INCLUDE YOURSELF, YOUR SPOUSE AND YOUR DEPENDENT CHILDREN** (if they will receive more than half of their support from you and your spouse). Include other people only if they lived with and received more than half of their support from you (and your spouse) at the time you completed your application AND will continue to receive this support between July 1, 2008 and June 30, 2009.

| FULL NAME | AGE | RELATIONSHIP (Spouse, daughter, son, etc.) | COLLEGE/UNIVERSITY (If enrolled at least half-time (6 semester hours) in a degree or certificate program between July 1, 2008 and June 30, 2009) |
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Section C: Parent's (Step-parent's) 2007 Income and Household Information:

8. **CHECK THE APPROPRIATE BOX (ES). ACCEPTABLE FORMS INCLUDE THE 2007 IRS FORM 1040, 1040A, 1040EZ, A TAX RETURN FROM PUERTO RICO OR A FOREIGN INCOME TAX RETURN.** If your parent(s)/step-parent(s) did not keep or cannot obtain a copy of their tax return, they should request a tax transcript from the Internal Revenue Service. In order to request a tax transcript, they should send in a Form 4506-T to the IRS. These forms are available in our office and on our website. In some cases, we may request verification that you did not file a tax return. Also please be advised that our office may request copies of your parent's (s) **W-2s**. If your parent(s) served in the military in 2007, you must provide a copy of their **Military Leave & Earnings Statement** from December 2007 (or for the last month they served).

- Check and attach: **2007 signed** tax return or transcript.
- Check and complete: **2007 signed** tax return or transcript will be mailed to the University by _____ (date).
- Check here if your parent(s)/step-parent(s) will not and are not required to file a **2007** U.S. Federal Income Tax Return.
SEE #9
- Check here if a signed tax return or transcript has already been submitted to the FAO.

9. If your parent(s)/step-parent(s) worked but were not required to file a 2007 U.S. Federal Income Tax Return, list their employers and the amounts of income that they earned from work in 2007. Attach copies of your W-2's or other earnings statements. **If they did not work in 2007, write in "Not Employed"**.

| EMPLOYER | AMOUNT |
|----------|----------|
| _____ | \$ _____ |
| _____ | \$ _____ |

10. If your parent(s)/step-parent(s) tax return lists an amount from a pension/annuity or IRA distribution, how much (if any) of this distribution is considered a rollover?
(Form 1040 - Line 15a or 16a, Form 1040A - lines 11a or 12a)
- \$ _____

Section C: Parent's (Step-parent's) 2007 Income and Household Information Continued:

11. Other untaxed income and benefits from Worksheet A on back (Parents/Step-Parents column): \$ _____
12. Total from Worksheet B on back (Parents/Step-Parents column): \$ _____
13. Total from Worksheet C on back (Parents/Step-Parents column): \$ _____

14. Fill in the information about people whom your parent(s)/step-parent(s) will support between July 1, 2008 and June 30, 2009. INCLUDE YOURSELF, YOUR PARENT(S)/STEP-PARENT(S) AND YOUR PARENT(S)/STEP-PARENT(S) OTHER DEPENDENT CHILDREN (if they will receive more than half of their support from your parent(s)/step-parent(s) or if they will be required to provide parental information when applying for federal student aid). Include other people only if they lived with your parents and received more than half of their support from your parent(s)/step-parent(s) at the time you completed your application AND will continue to receive this support between July 1, 2008 and June 30, 2009.

| FULL NAME | AGE | RELATIONSHIP (Father, mother, sister, brother, etc.) | COLLEGE/UNIVERSITY (If enrolled at least half-time (6 semester hours) in a degree or certificate program between July 1, 2008 and June 30, 2009) |
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Section D: Signatures:

* The student's signature is required in all cases.

**At least one parent or step-parent providing information in Section C must sign.

I certify that all the information provided on this form is true and accurate to the best of my knowledge.

*Student's Signature

Date

**Parent(s)/Step-Parent(s) Signature

Date

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

NOTE: Do not mail your completed worksheet to the Department of Education. Submit it to the ASU Financial Aid Office.

**AUGUSTA STATE UNIVERSITY
FINANCIAL AID OFFICE
2500 Walton Way
Augusta, Georgia 30904**

**Phone: 706-737-1431
Fax: 706-737-1777
Email: finaid@aug.edu
Website: www.aug.edu/financial_aid**

Student/Spouse

Worksheet

Parents/Step-
parents

Report Annual Amounts for Calendar Year 2007

| | | |
|----|--|----|
| \$ | Earned income credit from IRS Form 1040-line 66a; 1040A-line 40a; 1040EZ-Line 8a. | \$ |
| \$ | Additional child tax credit form 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 as reported in question 90 (or 66 for your parents), 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. | \$ |
| \$ | ←Enter in question 4. TOTALS Enter in question 11. → | \$ |

Worksheet B

Report Annual Amounts for Calendar Year 2007

| | | |
|----|--|----|
| \$ | 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 lines 28 and 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 a 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 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' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Education all Work-Study allowances. | \$ |
| \$ | Other untaxed income or benefits 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. | \$ |
| \$ | ←Enter in question 5. TOTALS Enter in question 12. → | \$ |

Worksheet C

Report Annual Amounts for Calendar Year 2007

| | | |
|----|---|----|
| \$ | 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 result of a legal requirement. Don't include support for children in your (or your parents') household, as reported in question 90 (or question 66 for your parents). | \$ |
| \$ | 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 interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships. | \$ |
| \$ | ←Enter in question 6. TOTALS Enter in question 13. → | \$ |