



# VERIFICATION WORKSHEET

## 2009-2010 Independent Student

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

Complete this form in its entirety. Failure to submit verification documents within two weeks of this request may affect your aid package.

### What you should do

1. Collect your (and your spouses)' financial documents (signed Federal income tax forms, W-2 forms, etc.).
2. Contact the Financial Aid Office if you have questions about completing this worksheet.
3. Complete and sign the worksheet.
4. Submit the completed worksheet, tax forms, W2's, and any other documents Montreat College requests to the Financial Aid Office.
5. The Financial Aid Office will compare information on this worksheet and any supporting documents with the information you submitted on your application. You or Montreat College may need to make corrections.

### A. Student Information

Last Name	Fist Name	M.I.	Social Security Number
Address (include Apt. no.)		Date of Birth	
City	State	ZIP Code	Phone # (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 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 rows, add another page.

Full Name	Age	Relationship	College
Martha Jones (example)	24	Wife	City University
		Self	

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

1. Check applicable boxes 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. Include your W2's.

- Check here if you are attaching a signed copy of your tax return AND a copy of your 2008 W2's  
 Check here if you will not file and are not required to file a 2008 U.S. Income Tax Return

2. Funds received for child support and other untaxed income. (See worksheets A&B of the FAFSA.)

Sources of Untaxed Income	2008 Amount	Other Sources of Untaxed Income	2008 Amount
a. Child Support	\$	d.	\$
b. Workman's Compensation	\$	e.	\$
c. Untaxed Pensions	\$	f.	\$

3. Child Support paid in 2008 \$ \_\_\_\_\_

4. If you are not required to file a Federal Income Tax Return must complete the Non-Tax Filers section below. List below the employer(s) and any work related income received in 2008.

Sources	2008 Amount
	\$
	\$
	\$

**D. Spouse's Tax Forms and Income Information (if student is married)**

1. Check applicable boxes below. Tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If your spouse did not keep a copy of the tax return, request a copy from their tax preparer or request an Internal Revenue Service form that lists tax account information. Include W2's.

- Check here if you are attaching a signed copy of your spouse's joint tax return AND 2008 W2's  
 Check here if you are attaching a signed copy of your spouse's separate tax return AND their 2008 W2's  
 Check here if your spouse will not file and are not required to file a 2008 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See worksheets A & B of the FAFSA.)

Sources of Untaxed Income	2008 Amount	Other Sources of Untaxed Income	2008 Amount
a. Child Support	\$	d.	\$
b. Workman's Compensation	\$	e.	\$
c. Untaxed Pensions	\$	f.	\$

3. Child Support paid in 2008 \$ \_\_\_\_\_

4. If your spouse did not file and is not required to file a 2008 Federal income tax return, list below your spouse's employer(s) and any income they received in 2008 (use the W-2 form or other earnings statements if available).

Sources	2008 Amount
	\$
	\$
	\$

**E. Sign this Worksheet**

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

\_\_\_\_\_  
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**