

2009-2010 VERIFICATION WORKSHEET

Your application was selected for review in a process called "Verification." In this process, our office will be comparing information from your application with signed copies of your and your spouse's 2008 Federal tax forms, or 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, we will send corrections electronically, to have your information reprocessed.

Complete this verification form and submit it to our office as soon as possible, so that your financial aid won't be delayed.

What you should do

1. Collect your and your spouse's financial documents (signed Federal income tax forms, W-2 forms, etc.).
2. If you have questions about completing this worksheet, call the Financial Aid Office at (800)882-3456.
3. Fill in and sign the worksheet—you and at least one parent.
4. Send the completed worksheet, tax forms, W-2(s) and any other reported documents to our office.

Taylor University must review the requested information, under the financial aid program rules (34 CFR, Part 668).

A. Student Information

Last name	First Name	M.I.	Social Security Number
Address (include apt. no.)			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 provide more than half of their support from July 1, 2009 through June 30, 2010, 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. 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 through June 30, 2010, and will be enrolled in a degree, diploma, or certificate program at a college/university which participates in the Federal student financial aid programs. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
<i>Missy Jones (example)</i>	<i>18</i>	<i>Sister</i>	<i>Central University</i>
		<i>Self</i>	

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, 1040EZ Tax Record, 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 a copy of an Internal Revenue Service form that lists tax account information.
- Check and attach signed tax return and student W-2(s)
- Check and complete: signed tax return and W-2(s) 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.
2. If you did not file and are not required to file a 2008 Federal income tax return, list below your employer(s) and any income received in 2008 (use the W-2 form or other earnings statements if available).

Sources	2008 Amount
	\$
	\$
	\$

D. Spouse's Tax Forms and Income Information

1. Check one box only. Tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ Tax Record, 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 a copy of an Internal Revenue Service form that lists tax account information.
- Check and attach signed tax return(s) and spouse's W-2(s).
- Check and complete: signed tax return(s) and W-2(s) will be submitted to the school by _____(date).
- Check here if your spouse 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 Federal income tax return, list below your spouse's employer(s) and any income received in 2008 (use the W-2 form or other earnings statements if available).

Sources	2008 Amount
	\$
	\$
	\$
	\$

E. Student 2008 Additional Financial Information

Student/Spouse

\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 – line 50 or 1040A – line 31
\$	Child support paid because of divorce or separation or as a result of legal requirement. Don't include support for children in your household, as reported in question 96 of the FAFSA.
\$	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 adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments) as well as grant and scholarship portions of fellowships and assistantships.
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in your Adjusted gross income. Combat pay is reported on the W-2 in Box 12, Code Q.

	Total
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F. Student 2008 Untaxed Income**Independent**

Student / Spouse

	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 forms in Boxes 12a through 12d, codes D, E, F, G, H and S.
	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 – line 28 + line 32 or 1040 A – line 17.
	Child support received for all children. Don't include foster or adoption payments.
	Tax exempt interest income from IRS Form 1040 – line 8b or 1040A – line 8b.
	Untaxed portions of IRA distributions from IRA 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 1040 A – lines (12a minus 12 b). Exclude rollovers. If negative, enter a zero here.
	Housing, food and other living allowances paid to members fo the military, clergy and others (including cash payments and cash value 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, such as worker's compensation, disability, etc. DON'T INCLUDE student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, combat pay (if you are not a tax filer), benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.
	Money received, or paid on your behalf (e.g., bills) not reported elsewhere on this form.

 Total
G. Sign and Date this Worksheet

By signing this worksheet, we certify that all the information reported on it is complete and correct. At least one parent must sign.

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

 Student

 Date

Mail this completed form to:
 Financial Aid Office
 Taylor University
 236 W Reade Ave
 Upland, IN 46989-1001

FAX: (765) 998-4910 or Email: finaid@taylor.edu