

2008-2009 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 spouses', if you are married) 2007 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 Upland Financial Aid Office at (800)882-3456 or the TUFW Financial Aid Office at (800)233-3922.
3. Fill in and sign the worksheet—you (and your spouse if you are married).
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, 2008 through June 30, 2009, 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, 2008 through June 30, 2009.

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, 2008 through June 30, 2009, 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>Martha Jones (example)</i>	<i>24</i>	<i>Wife</i>	<i>City 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 2007 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 2007 U.S. Income Tax Return.
2. If you did not file and are not required to file a 2007 Federal income tax return, list below your employer(s) and any income received in 2007 (use the W-2 form or other earnings statements if available).

Sources	2007 Amount
	\$
	\$
	\$

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

1. Check one box only. Tax returns include the 2007 IRS Form 1040, 1040A, 1040EZ Tax Record, 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 the tax preparer or a copy of an Internal Revenue Service form that lists tax account information.
- Check if you and your spouse did or will file a joint return.
- Check and attach signed tax return and spouse W-2(s) if your spouse filed a separate return.
- Check and complete: signed tax return and W-2(s) will be submitted to the school by _____ (date).
- Check here if your spouse will not file and is not required to file a 2007 U.S. Income Tax Return.
2. If your spouse did not file and is not required to file a 2007 Federal income tax return, list below your spouse's employer(s) and any income received in 2007 (use the W-2 form or other earnings statements if available).

Sources	2007 Amount
	\$
	\$
	\$

E. Student/Spouse Untaxed Income and Income Exclusions Worksheet (Calendar Year 2007)

Student/Spouse	Untaxed Income FAFSA Worksheet A
For question 40	
\$	Earned income credit from IRS Form 1040 – line 66a; 1040A-line 40a; 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 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 40.

Untaxed Income FAFSA Worksheet B

For question 41	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 +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 20 (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 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 41.

Untaxed Income FAFSA Worksheet C

For question 42	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 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 42.

F. Sign this Worksheet

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

Student

Date

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

Mail this completed form to:

Upland – Taylor University, Financial Aid Office, 236 W Reade Ave., Upland, IN 46989 or FAX: (765) 998-4910.

Fort Wayne – Taylor University Fort Wayne, Financial Aid Office, 1025 W Rudisill Blvd, Ft Wayne, IN 46807 or FAX: (260) 744-8850.