

2009-2010 INDEPENDENT VERIFICATION WORKSHEET

Return to:
 Financial Aid Office
 Humboldt State University
 Arcata, CA 95521-8299
 FAX: 707-826-5360
 Phone: 707-826-4321
 Toll free: 866-255-1390

Your financial aid application was selected for a process called "verification." Your 2009-2010 FAFSA information will be compared to this worksheet and your completed, signed federal income tax return. Upon completion of this review, we will send corrections as needed to the federal processing center. No payments will be disbursed until we receive and review these documents. Please follow these instructions:

1. **Do not leave any questions or sections blank. If the answer is zero, or does not apply to you, enter "0". Failure to do so will delay processing of your aid.**
2. **Sign the Certification on the back side of this form.**
3. **Attach a signed copy of all 2008 federal, corporate, and partnership tax returns** you completed, and all required schedules and attachments. If married filing separately, attach a copy of both returns. If separated or divorced, but filed jointly, attach all W-2 forms. If you did not keep a copy of your tax return, you may request a tax listing from the IRS by calling 1-800-829-3676, or obtain a copy from your tax preparer. *Note: IRS extensions are not accepted in place of a completed return.*
4. Write your name and HSU ID number on all forms you are returning.
5. No payments will be disbursed until we receive and review these documents.

A. Student Information

Last name	First name	MI	HSU ID number
Address (Include apt. no)			Date of birth
City	State	Zip	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 will 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, excluding your parent(s), who will be attending college 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 space, attach a separate page.

FULL NAME	AGE	RELATIONSHIP	COLLEGE
<i>(example) Martha Jones</i>	<i>24</i>	<i>wife</i>	<i>City University</i>
		self	

Continued on reverse →

C. 2008 Federal Income Tax Filing Status. If you (or your spouse) filed a 2008 U.S. Income Tax Return you must attach a copy.

If you (or your spouse) did not file and are not required to file a 2008 Federal income tax return, check box(es) below and list your employer(s) and any income received in 2008 (use the W-2 form or other earnings statements (if available)).		
	2008 Income Source	2008 Amount
<input type="checkbox"/> Student will not file a 2008 tax return. Tell us the source and amount of your income:		
<input type="checkbox"/> Spouse will not file a 2008 tax return. Tell us the source and amount of spouse's income:		

D. 2008 Additional Financial Information ****DO NOT LEAVE ANY BLANK SPACES****

STUDENT (and 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 a legal requirement. Don't include support for children in your household.
\$	Taxable earning 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 or scholarship portions of fellowships and assistantships.

E. 2008 Untaxed Income ****DO NOT LEAVE ANY BLANK SPACES****

\$	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 Box 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 -- line 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
\$	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.
\$	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 Educational Work-Study allowances.
\$	Other untaxed income and benefits not reported elsewhere on Worksheets A and B, such as worker's compensation, disability, etc. Don't include student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Workforce Investment Act educational 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.

E. Student signature is required. If you are married, your spouse's signature is optional.

We certify that all information reported on or submitted with this form is complete and correct to the best of our knowledge. We understand that if we purposely give false or misleading information to qualify for financial aid, we may be subject to prosecution, which may result in a fine, a prison sentence, or both.

Student Signature: _____

Date: _____

Spouse Signature: _____

Date: _____