



2009-2010 VERIFICATION WORKSHEET

STEP 1 – STUDENT INFORMATION

Last Name	First Name	Social Security Number	Student ID Number
Permanent Address	Street & Number	City/State/Zip	Date of Birth
Local Phone Number (include Area Code)	Permanent Phone Number (include Area Code)	Email Address	

STEP 2 – FAMILY INFORMATION

If you are a **dependent student**, include:

- Yourself
- Your parent(s) (including step-parents)
- Your parent(s)' other dependent children if a) your parent(s) will provide more than half of their support from July 1, 2009, through June 30, 2010, or b) the children would be required to provide parental information when applying for Federal Student Aid
- Other people only if they now live in your parent's household and your parents will provide more than half of their support from July 1, 2009, through June 30, 2010

If you are an **independent student**, include:

- Yourself
- Your spouse (if you are married)
- Your children if you will provide more than half of their support from July 1, 2009, through June 30, 2010
- Other people only if they live in your household and you provide more than half of their support and will continue to do so from July 1, 2009, through June 30, 2010

Full Name	Age	Relationship	Name of College/Degree Program (If at least half-time for 2009-2010)
		Self	Marylhurst University/ _____

STEP 3 – STUDENT TAX FORMS & INCOME INFORMATION – CALENDAR YEAR 2008

Are you or will you be required to file a 2008 Federal Income Tax Return?

_____ **YES**...Attach a signed copy of your Federal Income Tax Return, skip ahead to STEP 4.

_____ **NO**...Complete the table below and attach copies of ALL 2008 W-2 forms and continue to STEP 4.

Source of Income (Fill out only if you did NOT file taxes)	Amount Earned in 2008
TOTAL	

NOTE: If you did not keep a copy of your tax return and/or your W-2...Request a Tax Return Transcript and/or W-2 Wage Summary by calling the **IRS at 800.829.1040. Please be advised that it may take a minimum of three weeks for the IRS to mail these documents to you and you need to sign the copy you return to us. Your tax preparer may also be able to provide copies of these documents.**

STEP 4 – SPOUSE OR PARENT TAX FORMS & INCOME INFORMATION – CALENDAR YEAR 2008

Are you or will you be required to file a 2008 Federal Income Tax Return?

_____ **YES**...Attach a signed copy of your Federal Income Tax Return. Skip ahead to STEP 5.

_____ **NO**...Complete the table below and attach copies of ALL 2008 W-2 forms and continue to STEP 5.

Source of Income (Fill out only if you did NOT file taxes)	Amount Earned in 2008
TOTAL	

STEP 5 – UNTAXED INCOME – CALENDAR YEAR 2008

Type of Untaxed Income	Student	Spouse/Parent
Payments to tax-deferred pension/savings plans <i>Including codes: D, E, F, G, H, and S in Box 12a through 12d of W-2 Form</i>		
Deductible IRA and/or SEP, SIMPLE, and Keogh payments <i>IRS Form 1040 line 28 + line 32; 1040A line 17</i>		
Child support received for all children <i>Don't include foster care or adoption payments</i>		
Tax exempt interest income <i>IRS Form 1040 line 8b or 1040A line 8b</i>		
Untaxed portions of IRA distributions and pensions (EXCLUDE ROLLOVERS) <i>IRS Form 1040 lines (15a minus 15b) + (16a minus 16b) OR 1040A lines (11a minus 11b) + (12a minus 12b)... If negative, enter zero.</i>		
Housing, food and living allowances paid to members of the military, clergy, and others <i>Include cash payments and cash value benefits</i>		
Veterans' NON-education benefits <i>Such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances</i>		
Any other untaxed income or benefits such as Worker's Compensation Do not include: <i>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</i>		
Cash received or money paid on your behalf (e.g., bills), not reported elsewhere on this form <i>Student and Spouse ONLY</i>		
TOTAL		

STEP 6 – INCOME EXCLUSIONS – CALENDAR YEAR 2008

Type of Exclusion	Student	Spouse/Parent
Education credits (Hope and Lifetime Learning tax credits) <i>IRS Form 1040 line 49 or 1040A line 31</i>		
Child support paid because of divorce or separation <i>Don't include support for children in your household</i>		
Taxable earning from Federal Work-Study or other need-based employment work programs		
Student grant, scholarship, and fellowship aid reported to the IRS in your adjusted gross income <i>Only report amounts received in excess of tuition, fees, books and supplies</i>		
Combat pay or special combat pay <i>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</i>		
TOTAL		

STEP 7 – CERTIFICATION: By signing this worksheet, I certify all the information reported is complete and correct.

Student Signature	Date	Student Name (Please Print)	Student ID Number
Parent Signature (IF student is dependent) / Spouse Signature (IF Student is married)	Date	Parent/Spouse Name (Please Print)	