



# 2006-2007 Verification Worksheet

## Federal Student Aid Programs

FORM APPROVED  
OMB NO. 1845-0041

Your application was selected for review in a process called "Verification." In this process, your school will be comparing information from your application with signed copies of your (and your spouse's, if you are married) 2005 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, you or your school may need to make corrections electronically or by using your Student Aid Report (SAR).

Complete this verification form and submit it to your financial aid administrator as soon as possible, so that your financial aid won't be delayed. Your financial aid administrator will help you.

### What you should do

1. Collect your (and your spouse's) financial documents (signed Federal income tax forms, W-2 forms, etc.).
2. Talk to your financial aid administrator if you have questions about completing this worksheet.
3. Complete and sign the worksheet.
4. Submit the completed worksheet, tax forms, and any other documents your school requests to your financial aid administrator.
5. Your financial aid administrator will compare information on this worksheet and any supporting documents with the information you submitted on your application. You may need to make corrections electronically or by using your SAR. *Your school 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.)			Hofstra ID Number
City	State	ZIP code	Date of Birth
			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, 2006 through June 30, 2007, 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, 2006 through June 30, 2007.

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 college at least half time between July 1, 2006 and June 30, 2007, 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
Martha Jones (example)	24	Wife	City University
		Self	

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 1845-0041. The time required to complete this information collection is estimated to average twelve minutes, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: US Department of Education, Washington, DC 20202-5345.

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

1. Check only one of the boxes below. Tax returns include the 2005 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.

- Check and attach signed tax return.
- Check and complete - a signed tax return will be submitted to the school by \_\_\_\_\_ (date).
- Check if you will not file and are not required to file a 2005 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See Worksheets A & B of the Free Application for Federal Student Aid-FAFSA.)

Sources of Untaxed Income	2005 Amount	Sources of Untaxed Income	2005 Amount
a. Child Support	\$	d.	\$
b. Social Security (non-taxed)	\$	e.	\$
c. Welfare (including TANF)	\$	f.	\$

3. If you did not file and are not required to file a 2005 Federal income tax return, list below your employer(s) and any income received in 2005 (use the W-2 form or other earnings statements if available).

Sources	2005 Amount
	\$
	\$
	\$

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

1. Check only one box below. Tax returns include the 2005 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 the tax preparer or request 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 spouse's signed tax return if your spouse filed a separate return.
- Check and complete - a signed spouse's tax return will be submitted to the school by \_\_\_\_\_ (date).
- Check if your spouse will not file and is not required to file a 2005 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See Worksheets A & B of the Free Application for Federal Student Aid.)

Sources of Untaxed Income	2005 Amount	Sources of Untaxed Income	2005 Amount
a. Child Support	\$	d.	\$
b. Social Security (non-taxed)	\$	e.	\$
c. Welfare (including TANF)	\$	f.	\$

3. If your spouse did not file and is not required to file a 2005 Federal income tax return, list below your spouse's employer(s) and any income received in 2005 (use the W-2 form or other earnings statements if available).

Sources	2005 Amount
	\$
	\$
	\$

**E. Sign this Worksheet**

By signing this worksheet, I (we) certify that all the information reported on it is complete and correct. If married, spouse's signature is optional.

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

\_\_\_\_\_  
Student Date

\_\_\_\_\_  
Spouse Date

**Do not mail this worksheet to the Department of Education. Submit this worksheet to your Financial Aid Administrator at your school. Don't forget to sign your tax forms.**

Student/Spouse

Worksheet A

Parent(s)

**Report 2005 Total Annual Amounts (not monthly)**

**For FAFSA question 40**

**For FAFSA question 78**

Earned income credit from IRS Form 1040-line 66a; 1040A-line 41a; 1040EZ-line 8a or Telefile-line L

\$ \_\_\_\_\_ \$ \_\_\_\_\_

Additional child tax credit from IRS Form 1040-line 68 or 1040A-line 42

\$ \_\_\_\_\_ \$ \_\_\_\_\_

Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps or subsidized housing.

\$ \_\_\_\_\_ \$ \_\_\_\_\_

Social Security benefits received for **the entire year, not monthly amounts**, for all household members as reported in question 84 (or 65 for your parents), that were not taxed (such as SSI).

\$ \_\_\_\_\_ \$ \_\_\_\_\_

**Total \$** \_\_\_\_\_

**Total \$** \_\_\_\_\_

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Worksheet B

**Report 2005 Total Annual Amounts (not monthly)**

**For FAFSA question 41**

**For FAFSA question 79**

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 Keog and other Qualified plans from IRS Form 1040-total of lines 28+32 or 1040A-line 17

\$ \_\_\_\_\_ \$ \_\_\_\_\_

Child support you received for **all children for the entire year, not monthly amounts**. Don't include foster care payments.

\$ \_\_\_\_\_ \$ \_\_\_\_\_

Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b

\$ \_\_\_\_\_ \$ \_\_\_\_\_

Foreign income exclusion from IRS Form 2555-line 43 or 2555EZ-line 18

\$ \_\_\_\_\_ \$ \_\_\_\_\_

Untaxed portions of IRA distributions from IRS Form 1040-lines (15a-15b) or 1040A-lines (11a-11b). Exclude rollovers. If negative, enter a zero here.

\$ \_\_\_\_\_ \$ \_\_\_\_\_

Untaxed portions of pensions from IRS Form 1040-lines (16a-16b) or 1040A-lines (12a-12b). Exclude rollovers. If negative, enter a zero here.

\$ \_\_\_\_\_ \$ \_\_\_\_\_

Credit for federal tax on special fuels from IRS Form 4136-line 15, 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 and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.

\$ \_\_\_\_\_ \$ \_\_\_\_\_

Any other untaxed income/benefits not reported elsewhere on Worksheets A and B, such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung benefits, disability, etc. Don't include student aid, Workforce Investment Act education benefits, 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

\$ \_\_\_\_\_ \$ \_\_\_\_\_

**Total \$** \_\_\_\_\_

**Total \$** \_\_\_\_\_

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Worksheet C

**Report 2004 Total Annual Amounts (not monthly)**

**For FAFSA question 42**

**For FAFSA question 80**

Education credits (Hope and Lifetime Learning tax credits) from IRS Form-1040 line-50 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 84 (or question 65 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.

\$ \_\_\_\_\_ \$ \_\_\_\_\_

**Total \$** \_\_\_\_\_

**Total \$** \_\_\_\_\_