



Independent  
Student

## 2007-2008 REQUEST FOR RE-EVALUATION

To process a re-evaluation of your application for financial aid based on a change of your / spouse's financial situation, you must provide additional information and documentation. Information on this form, on your 2007-2008 Free Application for Federal Student Aid (FAFSA), and any supporting documentation will be used to determine whether eligibility for financial aid can be recalculated.

**Student's Name:** \_\_\_\_\_ **Hofstra ID 700-** \_\_\_\_\_ **Social Security #** \_\_\_\_ - \_\_\_\_ - \_\_\_\_

**Permanent Address:** \_\_\_\_\_ **Phone # ( )** \_\_\_\_\_

**Local Address:** \_\_\_\_\_ **Phone # ( )** \_\_\_\_\_

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1. Submit a **signed** copy of your / spouse's 2006 federal income tax return including all schedules **and** the enclosed Independent Verification Worksheet.
  2. Provide a written explanation and full documentation to support your request i.e. copy of last pay stub, unemployment benefits, letter of termination from employer, letter regarding termination of Social Security benefits, copy of death certificate, etc.
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**Circle the appropriate condition (A, B, C, or D) below:**

- A. You or your spouse earned money in 2006 but have lost this income in 2007. This may be a result of a disability, natural disaster or recent termination of employment.
- B. You or your spouse received unemployment compensation or some untaxed income benefit in 2006 and lost that income or benefit in 2007 (e.g. child support, social security benefits, etc.)
- C. You or your spouse have already applied for student aid and since that time, you have separated, divorced or have been widowed
- D. You or your spouse have experienced a significant change in your financial situation that did not result from one of the above listed conditions. Clearly define the change in financial circumstances in writing, attach this completed form and return to this office.

**Please indicate the date the event occurred** month \_\_\_\_\_ day \_\_\_\_\_ year \_\_\_\_\_

**\*\*\*\*Complete and Sign the reverse side of this form**

## STUDENT/SPOUSE EXPECTED INCOME FOR THE 2007 CALENDAR YEAR

**Report estimated annual total income for 1/2007 - 12/2007. Amounts must be for the year, not monthly amounts.**

- A. Expected 2007 **gross** income to be earned by student \$ \_\_\_\_\_
- B. Expected 2007 **gross** income to be earned by spouse \$ \_\_\_\_\_
- C. Expected 2007 income earned from unemployment compensation \$ \_\_\_\_\_
- D. Expected 2007 other taxable income (what kind \_\_\_\_\_) \$ \_\_\_\_\_
- E. Expected 2007 untaxed income and benefits:
1. Social Security Benefits \$ \_\_\_\_\_
  2. Aid to Families with Dependent Children (AFDC) \$ \_\_\_\_\_
  3. Child Support received for *all children* \$ \_\_\_\_\_
  4. Other Untaxed Income and Benefits (what kind \_\_\_\_\_) \$ \_\_\_\_\_

## CERTIFICATION

All information on this form and the attached statements is true and complete to the best of my knowledge.

Student signature: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse's signature: \_\_\_\_\_ Date: \_\_\_\_\_

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**RETURN TO:**

**Office of Financial Aid  
Memorial Hall / Room 202  
126 Hofstra University  
Hempstead, NY 11549**



# 2007-2008 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) 2006 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 (700#)
_____ 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, 2007 through June 30, 2008, 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, 2007 through June 30, 2008.

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, 2007 and June 30, 2008, 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	

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

Independent

1. Check only one of the boxes below. Tax returns include the 2006 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 here if you are attaching a signed copy of your tax return.
  - Check here if a signed tax return will be submitted to the school by \_\_\_\_\_ (date).
  - Check here if you will not file and are not required to file a 2006 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	2006 Amount	Sources of Untaxed Income	2006 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 2006 Federal income tax return, list below your employer(s) and any income received in 2006 (use the W-2 form or other earnings statements if available).

Sources	2006 Amount
	\$
	\$
	\$

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

1. Check only one box below. Tax returns include the 2006 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 here if you are attaching a signed copy of your spouse's tax return.
  - Check here and attach spouse's signed tax return if your spouse filed a separate return.
  - Check here if a signed spouse's tax return will be submitted to the school by \_\_\_\_\_ (date).
  - Check here if your spouse will not file and is not required to file a 2006 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See Worksheets A & B of the FAFSA)

Sources of Untaxed Income	2006 Amount	Sources of Untaxed Income	2006 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 2006 Federal income tax return, list below your spouse's employer(s) and any income received in 2006 (use the W-2 form or other earnings statements if available).

Sources	2006 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

**Report 2006 Total Annual Amounts (not monthly)**

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 **the entire year, not monthly amounts**, for all household members  
 as reported on this form, that were not taxed (such as SSI) from 1099 forms or IRS Form  
 1040-lines 20a-20b) or 1040A- lines (14a-14b).  
 \$ \_\_\_\_\_

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

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Worksheet B

**Report 2006 Total Annual Amounts (not monthly)**

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)  
 \$ \_\_\_\_\_

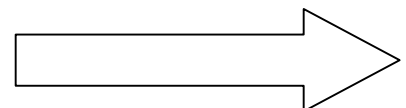
Veterans' noneducation benefits such as Disability, Death Pension, or Dependency and  
 Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.  
 \$ \_\_\_\_\_

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, combat pay not reported on the tax  
 return, etc. Don't include student aid, Workforce Investment Act education benefits, non-tax filer's combat pay 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 \$** \_\_\_\_\_

**ALSO COMPLETE BACK SIDE**



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**Worksheet C**

**Report 2006 Total Annual Amounts (not monthly)**

Education credits (Hope and Lifetime Learning tax credits) from IRS  
Form-1040 line-50 or 1040A line-31

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

Child support **you or your spouse paid** because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household.

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

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 or scholarship portions of fellowships and assistantships.

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

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

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**\*Check All That Apply for 2006**

**Student Questions :**

Check for each federal benefit program if you or anyone in your household reported on the first page of this form received benefits at any time during 2006.

\_\_\_ Supplemental Security Income Program (SSI)

\_\_\_ Food Stamp Program

\_\_\_ Free or Reduced Price School Lunch Program

\_\_\_ Temporary assistance for Needy Families

\_\_\_ Special supplemental Nutrition Program for Women,  
Infants and Children (WIC)

Recipient(s) Name(s) \_\_\_\_\_

**\*If you checked any of the above, you must submit verification of the benefit received for 2006. The documentation must specify the recipient(s) name and the year 2006.**