

2008-2009 VERIFICATION WORKSHEET

A. Student Information

Independent

Last Name	First Name	M.I.	Social Security Number
Address (include apt. no.)			Date of Birth
City	State	Zip	Phone Number
			Student ID

B. Family Information

Your marital status as of the date this form is completed:

- Married/Remarried Divorced/separated
 Single Widowed

Month and year you were married, separated, divorced or widowed:

_____ / _____
 Month Year

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, 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 in the space(s) below. 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- June 30, 2009, and will be enrolled in a degree, diploma, or certificate program.

Full Name	Age	Relationship to Student	Name of College Attending 2008-2009
		Self	UMass Dartmouth

C. Federal Tax Information

Student/Spouse

	I (we) have filed a 2007 federal income tax return. Check and attach 2007 Federal Income Tax Return. Include all W-2 forms and all schedules.
	I (we) have filed for extension from the IRS. Attach copy of IRS Form 4868.
	I (we) did not file and am not required to file a 2007 tax return. Attach all W-2 Forms.

If you do not have a copy of your tax return, contact the IRS at 1-800-829-1040 to request an IRS tax transcript.

COMPLETE ALL OF THE FOLLOWING QUESTIONS. Do no leave any items blank. If the answer is zero, answer as "0".

Student/Spouse

Worksheet A – Calendar year 2007

\$	Earned income credit from IRS Form 1040 –line 66a; 1040A – line 40a; or 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) Do not include food stamps or subsidized housing.
\$	Social Security Benefits received for all household members as reported in question 90 (or 66 for parents), that were not taxed (such as SSDI). Report benefits paid to parents in the parent column, and benefits paid directly to student (or spouse) in the Student/Spouse column.

Worksheet B – Calendar year 2007

\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including amounts reported on the W-2 Form in Boxes 12a-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. Do not 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 2555 EZ –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 17 (non-farmers 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 non-education benefits such as Disability, Death Pension, or Dependency and Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
\$	Any other untaxed income or benefits not reported elsewhere on Worksheets A and B such as worker’s compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Tax filers only: Report combat pay not included in adjusted gross income (Q35 and Q79). Don’t include student aid, Workforce Investment Act educational benefits, or benefits from flexible spending arrangements, e.g. cafeteria plans or combat pay if you are not a tax filer.
\$	Money received , or any money paid on your behalf (e.g. bills), not reported elsewhere on this form.

Worksheet C – Calendar year 2007

\$	Education Credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 –line 49 or 1040A – line 31
\$	Child support PAID because of divorce or separation (List names: _____) Do not include support for children listed in your (or your parents’) household.
\$	Taxable earnings from Federal Work-Study or other need-based work programs.
\$	Student grant, scholarships, and fellowship aid, including AmeriCorps awards, that was reported to the IRS in your (or your parents’) adjusted gross income.

Signature/Certification

By my signature, I certify that all information submitted with and written on this application is complete, accurate, and that corrections may be made based on data provided.

Student Signature

Spouse Signature (Required if Applicable)

Date ____ / ____ / ____