

Whitworth University Financial Aid Office

300 West Hawthorne Road, Spokane, WA 99251 509.777.3215 509.777.4601(fax)

2010-11 INDEPENDENT VERIFICATION WORKSHEET Federal Student Aid Programs

Whitworth must review the requested information, under the financial aid program rules (CFR Title 34, Part 668). Your application was selected for review in a process called "Verification". If there are differences between your application information and your financial documents, we may send corrections electronically to the Federal processor to have your information reprocessed and you will be notified via e-mail that your revised award information is available on Whitnet shortly thereafter. Try to complete verification as soon as possible so that your financial aid won't be delayed. Verification must be completed within 60 days from the start of the term to maintain eligibility for work study. **Verification must be completed no later than 120 days after the last date of enrollment or September 29 following the end of the academic year, whichever is earliest, or you will lose all financial aid eligibility.** Please call the Whitworth Financial Aid Office at 800.533.4668 or 509.777.3215 if you have any questions.

What you should do:

1. Collect your (and your spouse's) financial documents (signed Federal income tax forms, W-2 forms, etc.).
2. Complete and sign the worksheet.
3. Send the completed worksheet, **signed** tax forms, W-2s, and any other documents electronically to finaid@whitworth.edu or to the address or fax number listed above.

A. Student Information

_____ Last Name	_____ First Name	_____ M.I.	_____ Whitworth Student Identification Number
_____ Address (include apt. no.)			_____ Date of Birth
_____ City	_____ State	_____ ZIP Code	_____ Email Address

B. Family Information

Write the names of all household members. Also write in the name of the college for any household member, who will be attending college at least half time between July 1, 2010 and June 30, 2011, and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

List the people in your household, include:

- yourself, and your spouse if you have one, and
- your children, if you provide more than half of their support from July 1, 2010 through June 30, 2011, 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, 2010 through June 30, 2011.

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.

Tax returns include the 2009 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 the tax return**, request a copy from your tax preparer or call the Internal Revenue Service at 1.800. 829.1040 and request tax account information for financial aid purposes. (Be sure to sign these documents before submitting to the Financial Aid Office.)

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

STUDENT Please check the box below that is correct.

- I have attached a **signed** 2009 tax return and my W-2s.
- I have already submitted a **signed** 2009 tax return and my W-2s.
- A **signed** 2009 tax return(s) and my W-2s will be submitted to the school by _____ (date).
- I will not file and am not required to file a 2009 U.S. Income Tax Return. (Complete all sections below including *)

Please complete all items below. Use zeros when appropriate. If left blank, we will assume your answer is zero.

Additional Financial Information - Calendar Year 2009	STUDENT AMOUNT
Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31	
Child support you paid because of divorce or separation or as a result of a legal requirement. Do not include support for children in your household, as reported in question 96 of the FAFSA.	
Taxable earnings from Federal Work-Study or other need-based work programs	
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.	
Combat pay or special combat pay. 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.	
Untaxed Income Information - Calendar Year 2009	
	STUDENT AMOUNT
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 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-total of lines 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). Don't include the value of on-base military housing or basic military allowance for housing.	
Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances	
Any other untaxed income or benefits not reported, such as worker's compensation, disability, etc. Don't include student aid, earned income credit, additional 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.	

*** If you did not file a tax return, please complete** income earned from work during 2009 (Use the W-2 or other earnings statements):

Employer(s)	Amount	Employer(s)	Amount

D. Sign this Worksheet

By signing this worksheet, I certify that all the information reported on this worksheet is complete and correct. Warning: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student's Signature

Date

Daytime Phone Number