



2009-2010 Independent Verification Worksheet
Federal Student Aid Programs

Your application was selected by the U.S. Dept. of Education or by the Financial Aid Office for review in a process called "verification." In this process, we are required by federal law (34 CFR, Part 668) to compare the information from your application with the information provided on this form and with signed copies of you and your spouse's 2008 federal tax forms. If there are differences between your application and the documents you have submitted, corrections may need to be made. **We cannot process your financial aid until verification has been completed, so please provide the required documents as soon as possible.**

What you should do:

1. Collect your (and your spouse's) financial documents (signed Federal income tax forms, W-2, etc.).
2. Complete and sign this worksheet
3. Contact us if you have questions about completing this worksheet.
4. Bring or mail this completed worksheet, tax forms, and any other documents to our office.
5. We will compare the information on these documents and make electronic corrections if necessary. We will notify you if we are required to make any corrections.

A. Student Information

<i>Last Name</i>	<i>First Name</i>	<i>M.I.</i>	<i>Social Security Number</i>
<i>Address (include apt. #)</i>		<i>City</i>	<i>State</i> <i>Zip Code</i>
<i>Date of Birth</i>	<i>E-mail Address</i>	<i>()</i> <i>Phone Number</i>	

B. Family Information

Independent Students: List the people in your household, include: (a) yourself, and your spouse if applicable; and (b) your children, if you will provide more than half of their support from July 1, 2009 through June 30, 2010; and (c) other people who 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, 2009 through June 30, 2010.

Write the names of all household members. Include the names of colleges for any family member who will be attending college at least half-time between July 1, 2009 and June 30, 2010; and will be enrolled in a degree, diploma, or certificate program. For additional space, please attach a separate page.

Full Name	Age	Relationship	College
<i>Example: Martha Jones</i>	<i>24</i>	<i>Wife</i>	<i>City University</i>
		Self	

C. Tax Forms and Income Information

All tax filers must submit a **signed copy** of all 2008 Federal Income Tax returns, which include the 2008 IRS Forms: 1040, 1040A, 1040EZ, TeleFile Tax Record, a tax return from Puerto Rico or a foreign income tax return.

If you did not keep a copy, contact the IRS at 1-800-829-1040. Press "2- Refund or Personal Tax Account" then Press "2 - Personal Tax Account," follow the instructions until given the option to select a "tax return transcript", then follow the instructions.

If you (and/or your spouse) **did not and are not required** to file a 2008 Federal Income Tax Return, check the corresponding box below.

- You Your spouse

Both tax filers and non-tax filers must list any funds received or paid in 2008 below: **Enter zeros if not applicable.** If the information provided on this form does not match the information submitted on the FAFSA, you will be required to submit additional documentation to Southwestern's Financial Aid Office.

Student (spouse)	Calendar Year 2008 January 1, 2008 through December 31, 2008
2008 ADDITIONAL FINANCIAL INFORMATION (Report Annual Amounts)	
\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 or 1040A-line 31.
\$	Child support paid because of divorce or separation or as a result of a legal requirement.
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.
\$	Grant and scholarship aid reported to the IRS included in the adjusted gross income.
\$	Combat pay or special combat pay. (Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 Box 12, Code Q).
2008 UNTAXED INCOME (Report Annual Amounts)	
\$	Payments to tax-deferred pensions and savings plans (paid directly or withheld from earnings) including, but not limited to, amounts reported on W-2 Form Box 12a - 12d, codes D, E, F, G, H, and S.
\$	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040-line 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).
\$	Veterans' non-education benefits, such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study Allowances.
\$	Other untaxed income, not reported elsewhere, such as workers' compensation, disability, etc. Don't include: student aid, earned income credit, additional child tax credit, welfare benefits, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusions or credit for federal tax on special fuels.
\$	Money paid on your behalf (e.g., bills), not reported elsewhere on this form.

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, sentenced to jail or both. (per Federal Regulations as noted on the FAFSA).

Student's Signature

Date