

Pacific Lutheran University

Financial Aid Office, Tacoma, Washington 98447

2010-2011 Verification Worksheet – Dependent

Your application was selected for review in a process called “Verification.” In this process, PLU will be comparing information from your application with signed copies of your and your parent(s)’ 2009 Federal tax forms and 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, PLU may send corrections electronically to the Federal Processor to have your information reprocessed.

Complete this form and submit it to the PLU Financial Aid Office as soon as possible, so that your financial aid won’t be delayed.

What you should do

1. Collect your and your parent(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. Fill in and sign the worksheet – you and at least one parent.
4. Take the completed worksheet, tax forms, and any other documents your school needs to the Financial Aid Office.
5. Your financial aid administrator will compare information on the documents. You may need to make corrections electronically or by using your Student Aid Report (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	PLU student ID #
Address (include apt.no.)			Date of birth	E-mail address
City	State	Zip code	Area code and phone number	

B. Family Information

List the people in your **parents’ household**, include:

- yourself and your parent(s) (including stepparent) even if you don’t live with your parents, and
- your parents’ other children, even if they don’t live with your parent(s), if (a) your parents provide more than half of their support from July 1, 2010 through June 30, 2011, or (b) the children would be required to provide parental information when applying for Federal Student Aid, and
- other people if they now live with your parents, and your parents 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.

Write the names of all household members. 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, 2010 and June 30, 2011, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Name	Age	Relationship	College
<i>Suzi Lute (example)</i>	<i>18</i>	<i>Sister</i>	<i>Lute University</i>
		Self	Pacific Lutheran University

This form has 2 pages. Please complete both pages of this form.

STUDENT'S AND PARENT'S TAX FORMS AND INCOME INFORMATION

Tax returns include the 2009 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return.

Please complete all parts of this form.

- Check and attach your and your parent(s)' signed 2009 U.S. Income Tax Returns
OR
 Check if **you (the student)** will not file and are not required to file a 2009 U.S. Income Tax Return.
 Check if **your parent(s)** will not file and are not required to file a 2009 U.S. Income Tax Return.



If you or your parent(s) did not file and are not required to file a 2009 U.S. Income Tax Return list below your employer(s) and any income received in 2009.

Student	2009 Income	Employer
\$		
\$		
Parent(s)	2009 Income	Employer
\$		
\$		

2009 UNTAXED INCOME WORKSHEET MUST BE COMPLETED.

Please list amounts for the 2009 tax year. (January 1, 2009 through December 31, 2009 only.)

DO NOT LEAVE ANY BOX BLANK!

Parent	Student	2009 Untaxed Income Worksheet
↓ ↓	↓ ↓	↓ ↓
\$	\$	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 Keogh and other qualified plans from IRS Form 1040—line 28 + line 32 or 1040A—line 17
\$	\$	Child support you 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 military housing or the value of a basic military allowance for housing.
\$	\$	Veterans' noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.
\$	\$	Other untaxed income not reported in items 93a through 93h, such as workers' compensation, disability, etc. <i>Don't include:</i> student aid, earned income credit, additional child tax credit, welfare payments, untaxed social security benefits, Supplemental Security Income, Workforce Investment Act Educational Benefits on-base military housing or a military housing allowance, combat pay(if your parents are not tax filers), benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.
No Blanks	No Blanks	Please complete all boxes - No Blank Boxes Please!

SIGN THIS WORKSHEET : By signing this worksheet, we certify that all the information reported on this worksheet is complete and correct. ***At least one parent must sign.***

Student

Date

Parent

Date

Warning: If you purposely give false or misleading information on this worksheet, you may be fine, be sentenced to jail, or both