

Pacific Lutheran University

Financial Aid Office, Tacoma, Washington 98447

2010-2011 Verification Worksheet – Independent

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 spouse’s, if you are married) 2009 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, 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 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. Fill in and sign the worksheet.
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 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, 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.

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, diploma, or certificate program. If you need more space, attach a separate page.

| Name | Age | Relationship | College |
|----------------------------|-----------|---------------|-----------------------------|
| <i>Sven Lute (example)</i> | <i>24</i> | <i>Spouse</i> | <i>Lute University</i> |
| | | <i>Self</i> | Pacific Lutheran University |
| | | | |
| | | | |
| | | | |
| | | | |

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

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

| | |
|---|----------|
| Tax returns include the 2009 IRS Form 1040, 1040A, 1040EZ, a tax return form Puerto Rico, or a foreign income tax return. | |
| Please complete all parts of this form. | |
| Check and attach your and your spouse's signed 2009 U.S. Income Tax Returns. Check here and attach spouse's signed 2009 tax return if your spouse filed a separate return. Check if you and your spouse will not file and are not required to file a 2009 U.S. Income Tax Return. | |
| ↓ ↓ | |
| If you or your spouse did not file and are not required to file a 2009 U.S. Income Tax Return <u>list below</u> your employer(s) and any income received in 2009. | |
| Student's 2009 Income \$ | Employer |
| \$ | |
| Spouse'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!

| Student & Spouse ↓ ↓ | 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. |
| \$ | Veteran's non-educational benefits such as Disability, Death Pensions, 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. Don't include: Student aid, earned income credit, additional child tax credit, welfare payments, 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 exclusion or credit for federal tax on special fuels. |

No Blank Boxes!

Please complete all boxes - No Blank Boxes Please!

SIGN THIS WORKSHEET : By signing this worksheet, we certify that all the information reported on the worksheet is complete and correct. *If married, spouse's signature is optional*

Student

Date

Spouse

Date

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