

Financial Aid Office

2009-2010 Quality Assurance Verification Worksheet

Your application for financial aid has been selected for a process called Quality Assurance Verification. In this process, we will be comparing information from your application with signed copies of your (and your spouse's, if you are married) **2008** Federal income tax returns. Federal regulations require we confirm your application information before awarding Federal aid.

If there are differences between information on your FAFSA and this worksheet, we may send corrections to the FAFSA processor. You will receive an acknowledgement reflecting these changes. If we do make corrections, please do not make any subsequent changes to your FAFSA data.

Complete this Verification Worksheet and submit it to our office as quickly as possible so that your financial aid won't be delayed.

What you should do:

1. Collect your (and your spouse's) signed **2008 Federal** income tax return(s).
2. Complete and sign this worksheet.
3. Send the completed worksheet and a signed copy of your and your spouse(s)' 2008 Federal income tax returns to:

FAX: 309 438-3755

or mail:

**Illinois State University
Financial Aid Office
Campus Box 2320
Normal IL 61790-2320**

A. Student Information.

Last Name First Name M.I.

University ID Number

Permanent Home Address (include R.R., P.O. Box, or Apt. No.)

Date of Birth (MM/DD/YYYY)

City State ZIP

Telephone Number (include area code)

B. Family Information.

List all the people in your household. **Include yourself**, your spouse if you are married, your dependent children, and other people for whom you provide more than one-half of their support. Write the name of the college for anyone who will attend college at least half-time between July 1, 2009 and June 30, 2010, and who will be enrolled in a program leading to a degree, diploma or certificate.

Full Name	Age	Relationship	College or University
(example) Inez Jones	23	spouse	Parkside Community College
		self	Illinois State University

IMPORTANT tax return copy information:

If you filed a **Federal** 1040 or 1040A, we need only page 1 and page 2 (page 1 has name and SSN at top, page 2 has signature/date line at bottom), and Schedule K-1 (Form 1065) if you filed a 1065.

If you filed a Federal 1040 EZ, we need only the one page. **DO NOT** send your state tax return.

DO NOT send W2's, 1099's, or any other schedules unless they are requested by this office.

... please turn the page ←

C. Information from Student's (and spouse's) 2008 Federal Income Tax Return and Income Information.

1. **Check ONE box only.** "Tax return" includes the **2008** IRS Form 1040, 1040A, 1040EZ, a tax return for Puerto Rico or a foreign income tax return. If you did not keep a copy of the tax return you filed, request a copy from your tax preparer or a copy of an IRS form (Form 4506T) and IRS will send you an official account transcript.

- I have attached a signed, non-returnable copy of my **2008** Federal income tax return to this form. **OR**
 I will not file and am not required to file a **2008** Federal income tax return.

2. List below your employer(s) and any income received in **2008** (use your W-2 form(s), box 14 of IRS Schedule K-1 (Form 1065) or other earnings statement(s). Use a separate sheet of paper if you need more space.

	Employer(s)	2008 Earnings from W-2s (box 1) and 1065's	Total(s)
Student		+	
		+	=
Spouse		+	
		+	=

D. Additional Financial Information – List sources and amounts in the following table. (Complete all items; enter "\$0" for any that do not apply.):

STUDENT	(From questions 46 and 94 of FAFSA Form) Please Report Annual Amounts	SPOUSE
\$	Child support paid because of divorce, legal separation or as a result of a legal requirement. Don't include support for children in your household.	\$
\$	Taxable earnings from Federal Work-Study or other need-based work program(s).	\$
\$	Student grant, scholarship, fellowship and assistantship aid, including AmeriCorps awards, reported on your or your spouse's federal tax return as part of adjusted gross income.	\$
	Combat pay or special combat pay. Only enter the amount that was taxable and included in you or your spouse's adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	
\$	← TOTAL Adjustments to Income →	\$

... please go on to Section 2 ←

E. Untaxed Income – List Source(s) and Amount(s) in the following table. (Complete all items; enter “\$0” for any that do not apply.):

STUDENT	(From questions 47 and 95 of FAFSA Form) Please Report Annual Amounts	SPOUSE
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on Form W-2 Box(es) 12a – 12d, code(s) D, E, F, G, H and S.	\$
\$	Child support received for all children. Don't include foster care or adoption payments.	\$
\$	Housing, food, and other living allowances paid to members of the military, clergy, and others (include 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.	\$
\$	Any other untaxed income or benefits not reported on this form in Section 1 or Section 2, such as worker's compensation, untaxed portions of railroad retirement benefits, Black Lung benefits, disability, etc. Don't include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, combat pay, Workforce Investment Act educational benefits, or benefits from flexible spending arrangements, <i>i.e.</i> , cafeteria plans, foreign income exclusion or credit for federal tax on special fuels.	\$
\$	Money received , or paid on your behalf, not reported elsewhere.	\$
\$	← TOTAL Untaxed Income →	\$

F. Sign this Worksheet

By signing this worksheet, I (we) certify that all the information reported here to qualify for federal student aid is complete and correct.

student's signature

date

spouse's signature

date

student's e-mail address

Make and retain a copy of the completed form for your records.

FAX the completed original form to: 309 438-3755

or mail to: Illinois State University Financial Aid Office, Campus Box 2320, Normal, IL 61790-2320.

If you have questions about completing this worksheet, call the Illinois State University Financial Aid Office at (309) 438-2231 or e-mail financialaid@ilstu.edu.