



2009-2010 VERIFICATION WORKSHEET for Federal Student Aid Programs

Your application was selected by the U. S. Department of Education for review in a process called "Verification." In this process, *Samford University* will be comparing information from your 2009-2010 FAFSA with *signed copies* of you and your spouse's *2008 Federal tax forms, W-2 forms, and this worksheet*. If there are differences between your FAFSA information and your submitted financial documents, we will automatically send corrections electronically to the Department of Education, in order to have your information reprocessed. If changes are made, you will receive via mail/e-mail a new Student Aid Report (SAR) indicating these changes, which you should keep for your records; do not make further changes on the SAR after verification is complete. *It is important to complete verification as soon as possible, so that your financial aid will not be delayed.*

SUBMIT THE FOLLOWING FOR YOU & YOUR SPOUSE:

1. 2008 W-2 Forms (send copies only)
2. 2008 Federal Income Tax Return* *Signed* (send copies only)
*1040, 1040A, or 1040EZ
3. 2009-2010 Verification Worksheet *Signed and completed*
4. *Form SSA 1099 – if you receive Social Security Benefits*
5. *Schedule C – If you own a Business or show Business Income*

We prefer you to MAIL your completed verification and tax forms to Samford University, Office of Financial Aid, 800 Lakeshore Drive, Birmingham, AL 35229. If you live overseas, you may FAX your completed verification and tax forms (front and back) to (205) 726-2738.

I. STUDENT INFORMATION

Last Name	First Name	Middle Name	Social Security (required for verification)
Address (include apt. no.)			Date of Birth
City	State	Zip Code	() Phone Number
			E-Mail Address

II. FAMILY INFORMATION

Write the name, age, and relationship of the people in your *household* (see definition below). Also write the name of the college for any household member, excluding your spouse, 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. If you need more space, attach a separate page.

Household includes the following:

- yourself and your spouse, if applicable, and
- your children, if you will provide more than half of their support from July 1, 2009-June 30, 2010, 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, 2009-June 30, 2010.

Full Name	Age	Relationship to Student	College Name
		self/student	Samford University

III. ANSWER QUESTIONS #1-11. If not applicable, write n/a or \$0.

	STUDENT	SPOUSE
1. Are you filing or will you be filing a 2008 U.S. Income Tax Return*? (✓ Yes <u>or</u> No)	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no

* IRS Form 1040, 1040A, 1040EZ, Puerto Rica tax return, a foreign income tax return,

2. Place a check if in 2008 you, your spouse or anyone in your household received benefits from any of the federal benefits programs listed below?

(If you checked Supplemental Security Income, please provide Form SSA 1099, Social Security Benefit Statement)

Supplemental Security Income _____ Food Stamps _____ Free or Reduced Price Lunch _____ TANF _____ WIC _____

For questions 3-5, give the total balance according to the date you filed your 2009-2010 FAFSA.

	STUDENT	SPOUSE
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| 3. Cash, Savings, Checking - Do not include student financial aid | \$ _____ | \$ _____ |
| 4. **Investment, Real Estate Net Worth** - Do not include the home you live in | \$ _____ | \$ _____ |
| 5. **Business and/or Investment Farm Net Worth** - Attach a copy of Schedule(s) C, C-EZ, and/or E . | \$ _____ | \$ _____ |
| 6. Child support you received for all children. | \$ _____ | \$ _____ |
| 7. Housing, food and other living allowances paid to the military, clergy and others including cash and cash value | \$ _____ | \$ _____ |
| 8. Veterans noneducation benefits, such as Disability, Death Pension, DIC, or VA Educational Work-Study | \$ _____ | \$ _____ |
| 9. Other untaxed income 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, 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 | \$ _____ | \$ _____ |
| 10. Money received, or paid on your behalf (e.g., bills) not reported elsewhere on this form | \$ _____ | \$ _____ |
| 11. Child support you paid because of divorce or separation or as a result of a legal requirement. Do not include support for children living in your household as listed in section II of this Verification Worksheet | \$ _____ | \$ _____ |
| 12. Federal Work-Study (taxable earnings taken from your 2008 W-2 Form) | \$ _____ | \$ _____ |

****Net worth:** current value minus debt (only those debts that are related to the investment/farm/business).

****Investments:** include real estate, trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, 529 college savings plans, the refund value of 529 prepaid tuition plans, installment and land sale contracts (including mortgages held), commodities, etc. For information regarding education savings plans, call 800-433-3243. Do not include the value of life insurance, retirement plans, or cash, savings and checking already reported in question #3 above.

****Business and/or investment farm:** include the market value of land, buildings, machinery, equipment, inventory, etc.; you may only include those debts for which the business or investment farm was used as collateral. Do not include the value of a family farm that you/your spouse live on and operate, nor a small business that you/your spouse own and control and that have less than 100 or fewer full-time or full-time equivalent employees. If you filed a 1040 and it lists a profit or loss from a farm and/or business, you must answer questions 3-5 above.

IV. STUDENT/SPOUSE SIGNATURES

By signing below, we certify that all information reported 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.

Note: Please allow 10-15 days for processing. You may check the status of verification through Banner Self-Service via the Samford Portal. Once verification is complete, the Award Committee will send the student an electronic award letter via BANNER Self-Service detailing his/her financial aid and the actions that should be taken in order to accept the award package.

Student Signature: _____	Date: _____
Spouse Signature (optional): _____	Date: _____

Samford University must review the requested information under the financial aid program rules (34 CFR, Part 668). Federal regulations require that we ask you for this information and complete the verification process before awarding Federal aid.

*****MAKE SURE YOU'VE SIGNED YOUR TAX RETURN & THIS WORKSHEET *****