

# MERCER UNIVERSITY

## OFFICE OF STUDENT FINANCIAL PLANNING VERIFICATION WORKSHEET 2008 - 2009

### Student's Name and Address:

\_\_\_\_\_  
Last First M.I. Nickname Social Security Number or Mercer ID

\_\_\_\_\_  
Number & Street (Include Apt. No.) Date of Birth

\_\_\_\_\_  
City State ZIP Code E-mail Address

\_\_\_\_\_  
Home Phone Number (Include Area Code)

Your 2008 - 2009 Free Application for Federal Student Aid has been selected for review in a process called "Verification". As such, you are required to complete the appropriate sections of this form and return it, along with **signed** copies of your (and your parents' if dependent) 2007 Federal Income Tax Returns and all 2007 W-2 forms. Acceptable tax forms include: 1040, 1040A, 1040EZ, or foreign income tax return. **Electronic Form 8453 is NOT acceptable.** If you did not keep a copy of your federal return, you must request a tax transcript from the IRS (1-800-829-1040). Copies of your 2007 W-2's can also be obtained by contacting your employer(s). **Please include the student's Social Security number on all documents you submit to our office to prevent any confusion.**

**TO RECEIVE FEDERAL STUDENT FINANCIAL AID, YOU ARE REQUIRED BY LAW TO COMPLETE THE VERIFICATION PROCESS.**

### Section A: Student's 2007 Income Information (and spouse's if married)

This section must be completed by the student.

1) Check and attach a copy of your (and your spouse's if applicable) **2007 signed** Federal Tax Return and all W-2's. See instructions above for acceptable forms.

2) If you were not required to file, check here:  If you are married, and your spouse was not required to file, check here:

If student or spouse were not required to file a return, but worked in 2007, list employers and amount(s) earned below and **attach copies of all W-2's.**

\_\_\_\_\_ \$ \_\_\_\_\_ .00

\_\_\_\_\_ \$ \_\_\_\_\_ .00

3) Complete Section B if you meet the stated "independent student" criteria OR complete Section C if you are a dependent student.

4) Complete Worksheets A, B, and C on page 3 (Section D) of this form for student (and spouse if applicable) and sign the statement following the worksheets.

#### Please Note:

- All required sections must be completed (including Worksheets A, B, and C), entering "0" where applicable
- Signatures are required on this document as well as on copies of Federal tax forms
- Copies of 2007 Federal Tax returns AND W-2's must be enclosed
- W-2's must be provided even if no tax return was filed
- Any incomplete Verification Documents will be returned for completion
- No federal aid will be disbursed to the student's account until verification is complete.
- A hold will be placed on future registrations until verification is complete.
- If there are differences between your application information and your financial documents, your financial aid package may be revised.

**Section B: Independent Student's Household**

This section is **only** to be completed by students for whom one or more of the following is true:

- born before January 1, 1985
- married as of the day you completed the FAFSA
- are a veteran of the U.S. Armed Forces
- currently serving on active duty in the U.S. Armed Forces for purposes other than training
- will be working on a master's or doctorate degree during the school year 2008 - 2009
- are an orphan or ward of the court now or until you were 18
- have children who will receive more than half their support from you now through June 30, 2009

List the people in your household: include (a) yourself, your spouse if married; (b) your children, if you will provide more than half of their support from July 1, 2008 through June 30, 2009 and (c) any 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, 2008 through June 30, 2009. Also, write in the name of the college for any family member who will be attending college at least half-time between July 1, 2008 and June 30, 2009, **and** will be enrolled in a degree or certificate program. Include yourself.

Name of Family Member	Age	Relationship to Student	College for 2008 - 2009
_____	_____	self	Mercer University
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**Section C: Parent's 2007 Income and Household Information (include spouse of parent)**

If your parents are both living and married to each other, provide information about them. If your parents are divorced or separated, provide information about the parent you lived with more during the past 12 months and that parent's spouse, if married. If you did not live with one parent more than the other, give information about the parent who provided more financial support during the last 12 months and that parent's spouse, if married. (Note that grandparents and legal guardians are not parents.)

**\*\* IF LOW OR NO INCOME IS REPORTED, ADDITIONAL DOCUMENTATION MAY BE REQUIRED \*\***

1) Check and attach a copy of your parent(s) or step-parent(s) **2007 signed** Federal Tax Return(s) and all W-2's. See page 1 for acceptable forms.

2) If your parent(s) or step-parent(s) were not **required** to file, check here:

If your parent(s) or step-parent(s) were not required to file a return, but worked in 2007, list employers and amount(s) earned below and **attach copies of all W-2's.**

_____	_____	_____	.00
_____	_____	_____	.00

**3) People in Parent's/Stepparent's Household**

Include in your parent's/stepparent's household: (a) your parent(s) (including stepparents) and yourself, even if you did not live with your parents; (b) your parents' other children, even if they do not live with your parents, **if** (1) your parents will provide more than half of their support from July 1, 2008 through June 30, 2009, or (2) they would be required to give parental information when applying for Federal student aid; and (c) other people if they now live with your parents, and your parents will provide more than half of their support and will continue to do so from July 1, 2008 through June 30, 2009. Also, write in the name of the college for any family member (excluding parents) who will be attending college at least half-time between July 1, 2008 and June 30, 2009, **and** will be enrolling in a degree or certificate program. If you need more space, attach a separate page. **This household size section must be completed if the student does not meet the independency criteria in Section B.**

Name of Family Member	Age	Relationship to Student	College for 2008 - 2009
_____	_____	self	Mercer University
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

4) Complete Worksheets A, B, and C on page 3(Section D) of this form for parent(s) and step-parent(s) and sign the statement following the worksheets.

**Section D: Worksheets and Signatures**

How much, if any, of each of the following did you receive for the Calendar Year 2007?

**NOTE: You must enter an amount or zero (for both student and parent(s) or spouses) or the form will be returned to you**

Student (and spouse)	Report Annual Amounts	Parent(s) (and step-parent)
<b>Worksheet A</b>		
\$ _____	Earned income credit from IRS Form 1040-line 66a; 1040-A-line 40a; 1040EZ-line 8a	\$ _____
\$ _____	Additional child tax credit from IRS Form 1040-line 68 or 1040A-line 41	\$ _____
\$ _____	Welfare benefits, including Temporary Assistance for Needy Families (TANF). <b>Do not include Food Stamps or subsidized housing</b>	\$ _____
\$ _____	Social Security benefits received for all household members that were not taxed (such as SSI). <b>Attach a copy of the 2007 Social Security Benefits statement (Form SSA1099) for each recipient. Report benefits paid to parents in the parents' column, and benefits paid directly to student in the student/spouse column.</b>	\$ _____

<b>Worksheet B</b>		
\$ _____	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including 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 total lines 28 + 32 or 1040A-line 17	\$ _____
\$ _____	Child support <b>received</b> for all children. <b>Do not include foster care or adoption payments.</b>	\$ _____
\$ _____	Tax Exempt Interest income from IRS Form 1040-line 8b or 1040A-line 8b	\$ _____
\$ _____	Foreign income exclusion from IRS Form 2555-line 45 or 2555EZ-line 18	\$ _____
\$ _____	Untaxed portions of pensions from IRS Form 1040-lines (15a minus line 15b) + (16a minus 16b) or 1040A-lines (11a minus 11b) + (12a minus 12b) excluding rollovers <b>**NOTE**</b> Please enter the amount of above distribution that was rolled over: \$ _____ (Rollover Amount)	\$ _____
\$ _____	Credit for federal tax on special fuels from IRS Form 4136-line 20 - nonfarmers only	\$ _____
\$ _____	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	\$ _____
\$ _____	Any other untaxed income or benefits not reported elsewhere on Worksheets A and B, such as worker's compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Tax filers only: report combat pay not included in AGI. Do not include student aid, Workforce Investment Act educational benefits, combat pay if you are not a tax filer, or benefits from flexible spending arrangements, e.g. cafeteria plans.	\$ _____
\$ _____	Cash <b>received</b> , or any money paid on your behalf (e.g., bills), not reported elsewhere on this form	\$ <u>XXXXXXXXXX</u>

<b>Worksheet C</b>		
\$ _____	Education credits (HOPE and Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31	\$ _____
\$ _____	Child support <b>you paid</b> because of divorce or separation. Do not include support for children listed in your (or your parents') household	\$ _____
\$ _____	Taxable earnings from Federal Work-Study or other need-based work programs	\$ _____
\$ _____	Student grant, scholarship, and fellowship aid, including AmeriCorps benefits (awards, living allowances, and interest accrual payments), that were reported to the IRS in your (or your parents') adjusted gross income.	\$ _____

**Signatures**

I certify that all information provided on this form is true and correct to the best of my knowledge.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature (required if student is married)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature (or Step-Parent's)

\_\_\_\_\_  
Date

**Mail this completed worksheet and tax forms to the address on page 1. Make sure that tax forms are signed.**

# FOR OFFICE USE ONLY

	R	A	D
REFC _____			
Dependency Status _____			
Household Size _____			
Number in College (Exclude Parents) _____			
<b>STUDENT/SPOUSE:</b> (1040, 1040A, 1040EZ)			
Tax Return / Filing Status _____			
Student Work Income ( 7+12+18, 7, 1) + [ _____ ]			
Spouse Work Income ( 7+12+18, 7, 1) + [ _____ ]			
AGI (37, 21, 4) OR + _____		OR + _____	
Income Tax Paid (57, 35, 10) - _____		- _____	
<b>Worksheet A:</b> + _____			
Earned Income Credit (66a, 40a, 8a) _____		+ _____	
Additional Child Tax Credit (68, 41, -) _____		+ _____	
Welfare Benefits (TANF, exclude Food Stamps) _____		+ _____	
Untaxed Social Security Benefits (20a - 20b, 14a - 14b, -) _____		+ _____	
<b>Worksheet B:</b> + _____			
Pymts to tax deferred pension plans (W-2,Boxes 12a-12d, Codes D,E,F,G,H,S) _____		+ _____	
Child Support Received _____		+ _____	
IRA/Keogh Deductions (28+32, 17, -) _____		+ _____	
Untaxed Pensions (15a/16a-15b/16b, 11a/12a-11b/12b,-) Exclude Rollovers _____		+ _____	
Tax Exempt Interest Income (8b, 8b, -) _____		+ _____	
Foreign Income Exclusions (Form2555-line45, 2555EZ-line 18) _____		+ _____	
Other _____		+ _____	
<b>Worksheet C:</b> - _____			
Education Credits (49, 31, -) _____		- _____	
Child Support Paid _____		- _____	
Taxable Earnings from Federal Work-Study Program _____		- _____	
Other _____		- _____	
<b>PARENTS:</b> (1040, 1040A, 1040EZ)			
Tax Return / Filing Status _____			
Father's Work Income ( 7+12+18, 7, 1) + [ _____ ]			
Mother's Work Income ( 7+12+18, 7, 1) + [ _____ ]			
AGI (37, 21, 4) OR + _____		OR + _____	
Income Tax Paid (57, 35, 10) - _____		- _____	
<b>Worksheet A:</b> + _____			
Earned Income Credit (66a, 40a, 8a) _____		+ _____	
Additional Child Tax Credit (68, 41, -) _____		+ _____	
Welfare Benefits (TANF, exclude Food Stamps) _____		+ _____	
Untaxed Social Security Benefits (20a - 20b, 14a - 14b, -) _____		+ _____	
<b>Worksheet B:</b> + _____			
Pymts to tax deferred pension plans (W-2,Boxes 12a-12d, Codes D,E,F,G,H,S) _____		+ _____	
Child Support Received _____		+ _____	
IRA/Keogh Deductions (28+32, 17, -) _____		+ _____	
Untaxed Pensions (15a/16a-15b/16b, 11a/12a-11b/12b,-) Exclude Rollovers _____		+ _____	
Tax Exempt Interest Income (8b, 8b, -) _____		+ _____	
Foreign Income Exclusions (Form2555-line45, 2555EZ-line 18) _____		+ _____	
Other _____		+ _____	
<b>Worksheet C:</b> - _____			
Education Credits (49, 31, -) _____		- _____	
Child Support Paid _____		- _____	
Other _____		- _____	
<b>TOTAL:</b> _____		- _____	= _____
Verification Completed:			<b>Net Difference</b>
VEFC _____ Initial _____ Date _____			
306 _____ 325 _____			