



Federal Student Aid Programs

2008-2009 Verification worksheet for Independent Students

- Please review the email sent by the Enrollment Services Center: if tax return information is being requested, collect your and your spouse's' signed 2007 Federal income tax forms, 2007 W-2 forms, etc.
- Complete and sign this worksheet.
- Submit this worksheet, tax forms, and any other documents requested to:
ESC, Southern Oregon University, 1250 Siskiyou Blvd., Ashland, Oregon, 97520

A. Student Information

_____	_____	_____	_____
Last name	First name	M.I.	Social Security Number
_____			_____
Local address (include apt. #)			Date of birth
_____	_____	_____	_____
City	State	ZIP code	Phone number (include area code)

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, 2008 through June 30, 2009, even if they do not live with you; 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, 2008 through June 30, 2009.
- Write the names of all household members in the space(s) below. Also write in the name of the college for any household member, excluding your parent(s), who will be attending at least half time between July 1, 2008 and June 30, 2009, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship to Student	College attending 2008-09
		Self	Southern Oregon University

If you or your spouse were not required to file a 2007 Federal income tax return, list total 2007 earnings below:

Student \$ _____

Spouse \$ _____

Student/Spouse	Worksheet A: report annual amount for calendar year 2007
\$	Earned income credit from IRS Form 1040--line 66a; 1040A—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). Do not include food stamps or subsidized housing.
\$	Social Security benefits received, that were not taxed (such as SSI), for all household members as reported in question 90. Report benefits paid directly to student (or spouse).
\$	Total
Student/Spouse	Worksheet B: report annual amount for calendar year 2007
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but 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—total of 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.
\$	Foreign income exclusion from IRS Form 2555-line 45 or 2555EZ-line 18.
\$	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.
\$	Credit for federal tax on special fuels from IRS Form 4136--line 17—(non-farmers 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.
\$	Other untaxed income not reported elsewhere on Worksheets A and B, such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Tax filers only: report combat pay not included in adjusted gross income (FAFSA questions 35 and 79). Don't 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.
\$	Total
Student/Spouse	Worksheet C: report annual amount for calendar year 2007
\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040—line 49 or 1040A—line 31.
\$	Child support you paid because of divorce or separation or as a result of a legal requirement. Do not include support for children in your household, as reported in question 90.
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.
\$	Student grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.
\$	Total

I certify that all the information reported on it is complete and correct.

Student _____

Date _____