

Southern Oregon University Federal Student Aid Programs

2009-2010 Verification Worksheet for Dependent Students

- Please review the email sent by the Enrollment Services Center: if tax return information is being requested, collect your and your parent(s)' signed 2008 Federal income tax forms, 2008 W-2 forms, etc.
- Complete and sign this worksheet (you and the parent whose financial information is on the FAFSA).
- 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.	SOU ID #
Permanent address (include apt. #)			Date of birth
City	State	ZIP	Phone number (include area code)

B. Family Information

- List the people in your parent(s)' household, include:
- Yourself and your parent(s) (including stepparent) even if you don't live with your parents;
- Your parents' other children, even if they don't live with your parent(s), if (a) your parents will provide more than half of their support from July 1, 2009 through June 30, 2010, or (b) the children would be required to provide parental information when applying for federal student aid; and
- Other people if they now live with your parents, and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2009 through June 30, 2010.
- 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, 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.

Full Name	Age	Relationship to Student	College attending 2009-10
		Self	Southern Oregon University

If you or your parent(s) were not required to file a 2008 Federal income tax return, list total 2008 earnings below; your signature certifies that all information reported on either side of this form is complete and correct.
WARNING: If you purposefully give false or misleading information, you may be fined, sentenced to jail, or both.

Student \$ _____

Parent(s) \$ _____

Student Signature _____

Parent Signature _____

Student Name _____

Student ID _____

2008 Calendar Year Additional Financial Information

Parents' (Q94)		Student/Spouse (Q46)
\$ <input type="text"/>	a. Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040—line 50 or 1040A—line 31.	\$ <input type="text"/>
\$ <input type="text"/>	b. Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your (or your parents') household, as reported in question 96 (or question 75 for your parents).	\$ <input type="text"/>
\$ <input type="text"/>	c. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$ <input type="text"/>
\$ <input type="text"/>	d. Grant and scholarship aid reported to the IRS in the adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$ <input type="text"/>
\$ <input type="text"/>	e. Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$ <input type="text"/>

Parents' (Q95)	2008 Untaxed Income	Student/Spouse (Q47)
\$ <input type="text"/>	a. 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 forms in Boxes 12a through 12d, codes D, E, F, G, H and S.	\$ <input type="text"/>
\$ <input type="text"/>	b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040—line 28 + line 32 or 1040A—line 17.	\$ <input type="text"/>
\$ <input type="text"/>	c. Child support received for all children. Don't include foster care or adoption payments.	\$ <input type="text"/>
\$ <input type="text"/>	d. Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.	\$ <input type="text"/>
\$ <input type="text"/>	e. 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.	\$ <input type="text"/>
\$ <input type="text"/>	f. 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.	\$ <input type="text"/>
\$ <input type="text"/>	g. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).	\$ <input type="text"/>
\$ <input type="text"/>	h. Veterans noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$ <input type="text"/>
\$ <input type="text"/>	i. Other untaxed income not reported, such as workers' comp., 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.	\$ <input type="text"/>
XXXXXXXXXX	j. Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$ <input type="text"/>