

# 2009 – 2010 INDEPENDENT Verification Worksheet

## University of the Sciences in Philadelphia: Financial Aid

Your Free Application for Federal Student Aid (FAFSA) was selected for review in a process called "Verification". The process of your 2009 – 2010 financial aid can not be completed until the necessary documentation is received by the USP Financial Aid Office. The following items are required:

- (1) This completed and signed Verification Worksheet.
- (2) Your SIGNED 2008 Federal Tax Return with all schedules, or if applicable, the Statement of Non-Filing in Section 4.
- (3) If you are married and you filed separately in 2008, your Spouse's SIGNED 2008 Federal Tax Return, or if applicable, the Statement of Non-Filing in Section 5.

If there are any differences between your FAFSA information and your financial documents, USP may need to make corrections to your record.

### 1. Student Information

	Student ID #
Last Name, First Name, M.I.	_XXX – XX - _____ Social Security Number
Address	Date of Birth
City, State, Zip Code	Phone Number

### 2. Family Information

List the people in your household, including:

- Yourself, and your spouse if you have one, and
- Your children, if you will provide more than half of their support from July 1, 2009 through 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 through June 30, 2010.

Write the names below of all household members that comply with the above guidelines. Also write in the name of the college for any household member, excluding parent(s), 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.

Full Name	Age	Relationship	College
		Self	University of the Sciences

### 3. Additional Financial Information Worksheets for 2008

Complete this FAFSA worksheet with the student (and spouse's) information.

Student/Spouse

### Additional Financial Information

Report 2008 Annual Amounts

\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 – line 50 or 1040A – line 31.
\$	Child support you paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household.
\$	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.
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Combat pay is reported on the W-2 in Box 12, Code Q.
\$	

### Untaxed Income

Report 2008 Annual Amounts

\$	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 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 lines 28 + 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.
\$	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 – 16b) or 1040A – lines (12a – 12b). Exclude rollovers. If negative, enter a zero here.
\$	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits).
\$	Veteran's 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, such as workers' compensation, disability, etc. Don't include student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, 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.
\$	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.
\$	

### Other Financial Support

Report 2008 Annual Amounts

\$	Welfare benefits, including Temporary Assistance for Needy Families (TANF)
\$	Social Security benefits received that were not taxed, for all household members, including SSI
\$	Food Stamps: value for the 2008 calendar year
\$	

**4. Student's Income Information and Tax Forms**

Check one space only. Acceptable tax returns include the signed 2008 IRS Form 1040, 1040A, 1040EZ, Telefile Tax Record, 1040PC, a tax return from Puerto Rico or a foreign tax return with U.S. dollar equivalents.

Check and attach signed tax return with all schedules, W-2s and 1099 forms, if applicable.

Check and complete: signed tax return will be submitted by \_\_\_\_\_ (date)

Check here if you will not file and are not required to file a 2008 U.S. Income Tax Return. Complete the following Statement of Non-Filing and attach W-2s and/or 1099 forms, if applicable. If you did not have any income, put a zero under "Amount".

Sources of income (employer, bank interest, etc...)	2008 Amount (\$)

**5. Spouse's Income Information and Tax Forms**

Check one space only. Acceptable tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ, Telefile Tax Record, 1040PC, a tax return from Puerto Rico or a foreign tax return with U.S. dollar equivalents.

Check and attach signed tax return with all schedules, W-2s and 1099 forms, if applicable.

Check and complete: signed tax return will be submitted by \_\_\_\_\_ (date)

Check here if you will not file and are not required to file a 2008 U.S. Income Tax Return. Complete the following Statement of Non-Filing and attach W-2s and/or 1099 forms, if applicable. If you did not have any income, put a zero under "Amount".

Sources of income (employer, bank interest, etc...)	2008 Amount (\$)

**6. Signatures**

By signing this worksheet, we certify that all the information reported on it is complete and correct.

Student	Date
Spouse	Date

Please note: **All tax returns** (including Telefile Tax Records and 1040PCs) **must be signed and dated**. Please return this worksheet, along with the required documentation, to:

University of the Sciences in Philadelphia  
Financial Aid Office  
172 Griffith Hall  
600 South 43<sup>rd</sup> Street  
Philadelphia, PA 19104  
Fax (215) 596-8554

If you have any questions, please feel free to contact the Financial Aid Office at (215) 596-8894. Our hours are 9:00 a.m. to 5:00 p.m., Monday through Friday.