

2008-2009 Verification Worksheet



James Madison University
Office of Financial Aid & Scholarships
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Your application was selected for review in a process called "Verification". In this process, JMU will be comparing information from your Student Aid Report (SAR) with signed copies of your, your parents (and your spouse's, if you are married) 2007 Federal tax forms with W-2 forms and/or other financial documents. Federal law requires that this be done before awarding federal aid. The JMU financial aid office will correct any differences between your application information and your financial documents.

What you should do – Complete and sign this form. Attach copies of all 2007 federal income tax returns & W-2's.

Section A: Student Information

ALL FEDERAL TAX FORMS MUST BE SIGNED BY TAX FILER.

Last Name	First Name	M.I.	Student I.D. #
Address (include apt. number if appropriate)			Social Security Number
City	State	ZIP Code	Phone Number (please include area code)
JMU E-mail			Date of Birth

Section B: Family Information

DEPENDENT - **List the people in your parents' household**, include: yourself and your parent (s) (including stepparent), and your parents' other children, even if they don't live with your parent(s), if (a) your parents provide more than half of their support from July 1, 2008 through June 30, 2009, or (b) 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, 2008 through June 30, 2009. Identify any household members who will be attending college 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.

INDEPENDENT – **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, and other people it they now live with you, and you currently provide more that half of their support and will continue to provide more than half of their support from July 1, 2008 through June 30, 2009. Identify any household members who will be attending college 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	College
		<i>Self</i>	<i>James Madison University</i>

Section C: Income & Tax Information Required for Verification

TAX FILERS:

Dependent Students: Submit **signed** copies of your and your parent(s) **2007 income tax returns** and **W-2 forms**.

Independent Students: Submit **signed** copies of your and your spouse's (if married) **2007 income tax returns** and **W-2 forms**.

- ◆ Please make sure that all forms (other than W-2's) have dated signatures and are submitted in their entirety.
- ◆ **Please make sure that your (the student's) Social Security number is on each form.**
- ◆ Documents may be submitted in person, by mail, or by fax.

CERTIFICATION FOR NON-TAX FILERS:

- Check here if student will not file and is not required to file a 2007 federal income tax return.
- Check here if your parent (or stepparent) will not file and is not required to file a 2007 federal income tax return.
- Check here if your spouse (if married) will not file and is not required to file a 2007 federal income tax return.

For every box checked above, please list below in the corresponding column any employer(s) and any income earned in 2007 (use the W-2 form or other earnings statements if available). **W-2 form must still be submitted. Do not leave any blanks; use zero "0" or N/A if not applicable.**

Source of 2007 Yearly Income & Benefits	Student	Parent(s)	Spouse (if married)

Section D: Worksheet Information

Worksheet A: Do not leave any blanks; use zero "0" or N/A if not applicable.

Source of 2007 Untaxed Income	Student	Parent(s)	Spouse (if married)
Social Security Benefits for 2007:			
*Welfare benefits including TANF:			
Other: (please list)			

*Don't include Food Stamps or subsidized housing.

Worksheet B: Do not leave any blanks; use zero "0" or N/A if not applicable.

Source of 2007 Untaxed Income	Student	Parent(s)	Spouse (if married)
Child support received for all children:			
Housing food and other living allowances paid to members of the military clergy or others:			
Any other untaxed income or benefits not reported elsewhere on Worksheets A and B such as worker's compensation:			
Cash received or any money paid on your behalf not reported elsewhere on this form:			

Worksheet C: Do not leave any blanks; use zero "0" or N/A if not applicable.

2007	Student	Parent(s)	Spouse (if married)
Child support paid because of divorce or separation:			
Taxable earnings from Federal Work-Study or other need-based work programs:			

By signing this worksheet, I (we) certify that all the information reported is complete and correct. I (We) further understand that purposely giving false or misleading information regarding eligibility for federal aid may result in fines, jail terms, or both. Additionally, I (we) understand this student's record may be deactivated from financial aid processing if a response to this Verification request is not submitted within 60 calendar days of the date the request was sent to me (us), or by the Monday prior to the last day of classes (not final exams), whichever comes first.

Student signature (required)

Date

Parent/Step-parent signature
(one required, if dependent)

Date