

**Financial Aid Office**  
 Salem State University  
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 Salem, MA 01970-5353

Phone: 978-542-6112  
 Fax: 978-542-6876  
 Website: www.salemstate.edu /finaid

## 2011-2012 VERIFICATION WORKSHEET

Your application was selected for review in a process called Verification. During this process we will be comparing information from your FAFSA with this document and attached parent and student (and spouse, if married) signed 2010 Federal Income Tax forms. The law states that we have the right to ask for this information from you before you can be awarded Federal Financial Aid. Should there be differences between your Student Aid Report (SAR) and the documents that you provided to our office, we will automatically make corrections to your Student Aid Report. Should we be unable to resolve discrepancies, we may ask for further clarification. Complete this Verification Form as soon as possible so that your Financial Aid Administrator may process your financial aid without delay.

### WHAT YOU SHOULD DO

- ➔ Collect **signed** copies of you and your spouse's or parent's 2010 federal tax forms, W2s, and all schedules. If you need to request a copy of your tax form, please contact the IRS at 1-800-829-1040.
- ➔ Read thoroughly, complete and sign this worksheet. If you are dependent, please make sure that your parents also sign this form. If you have any problems completing this form, please feel free to contact our office.
- ➔ Please make sure to return this form to the Office of Financial Aid as quickly as possible.

*We must review the requested information under Federal financial aid program guidelines (CFR title 34, Part 668)*

### A: Student Information

Last Name	First Name	M.I.	Social Security Number	Student ID #
Street (apt #)	E-mail address			Date of Birth
City	State	Zip Code	Local Phone Number	

### B: Family Information

**If you are a Dependent Student, include:**

- Yourself and your parent(s) (including stepparent) even if you don't live with your parents, and
- Your parent(s) dependent children, if your parents will provide more than half of their support from July 1, 2010 through June 30, 2011.

**If you are an Independent\* Student, include:**

- Yourself and your spouse (if married)
- Your dependent children, if you will provide more than half of their support from July 1, 2010 through June 30, 2011.

**Include other people as part of your household only if:**

- They now live with you (or your parent(s), if dependent) and if you or your parent(s) will be providing more than half of their support between July 1, 2010 through June 30, 2011.

*\* A student is considered Independent only if any of the following are true: 1) born before 1/1/87; 2) will be enrolled in a graduate program; 3) married; 4) an orphan or ward of the court until age 18; 5) has a legal dependent; 6) has a guardian appointed by the state; 7) is on active duty or veteran; 8) determined by state agency to be homeless; 9) court approved emancipated minor.*

Full Name of student and family members <small>(attach separate sheet if more space is needed)</small>	Age	Relationship to you	List name of College (Do not include parent in college) Must be enrolled at least half time
		SELF	

## C: Federal Tax Return Information

Please note: we accept faxed taxes, except for the TELEFILE, as original signatures are required on this form.

**Student (and Spouse) please check one box:**

- I/we have filed a 2010 Federal Income Tax Return and have attached them to this document. Tax returns include: 2010 IRS Form 1040, 1040A, 1040EZ, Telefile, Puerto Rico or Foreign tax return **translated**.
- I/we did not and am not required to file a 2010 Federal Income Tax Return. Any wages earned, but not filed, are indicated in worksheet below.
- I/we have not filed 2010 Federal Income taxes as of this date, but will be filing Federal Income Tax Returns. As soon as they are completed, copies will be submitted.

**Parent (required, if dependent) please check one box:**

- I/we have filed a 2010 Federal Income Tax Return and have attached them to this document. Tax returns include: 2010 IRS Form 1040, 1040A, 1040EZ, Telefile, Puerto Rico or Foreign tax return **translated**.
- I/we did not and am not required to file 2010 a Federal Income Tax Return. Any wages earned, but not filed, are indicated in worksheet below.
- I/we have not filed 2010 Federal Income taxes as of this date, but will be filing our Federal Income Tax Returns. As soon as they are completed, copies will be submitted.

## D: Federal Untaxed Income, Benefits and Income Exclusions

**PLEASE USE ANNUAL AMOUNTS FOR 2010 And Do Not leave any spaces BLANK. If ZERO, write "0"**

Student/Spouse		Parent(s)
\$	Social Security Benefits received that were not taxed (such as SSI). Welfare benefits, including Temporary Assistance to Need Families (TANF). Do not include food stamps or subsidized housing.	\$
\$	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), excluding rollovers	\$
\$	Payments to tax-deferred pension and savings plan paid directly or withheld from earnings, including amount reported on your W-2 form in Boxes 12a through 12d, codes D,E,F,G,H,S.	\$
\$	IRA Deductions and payments to self-employment SEP, SIMPLE and Keogh.	\$
\$	Child support <b>received</b> for all children. Do not include foster or adoption payments.	\$
\$	Untaxed portions of pensions from IRS 1040 – lines (16a minus 16b) or 1040A – lines (12a minus 12b), excluding rollovers.	\$
\$	Housing, food and other living allowances paid to members of the clergy, military, and others. (Including cash payments and cash value of benefits).	\$
\$	Veteran’s non-education benefits, such as Disability, Death Pension, DIC, and/or VA Educational Work-Student Allowance.	\$
\$	Any other untaxed income and benefits not reported elsewhere, such as worker’s compensation, untaxed portion of Railroad Retirement Benefits, Black Lung Benefits, and Refugee Assistance. Do not include student financial aid.	\$
\$	Cash received or any money paid on your behalf, not reported elsewhere on this form.	XXXXXXXXXX
\$	Untaxed Wages earned but not reported on a federal income tax return.	\$
<b>INCOME EXCLUSION</b>		
\$	Child support paid because of divorce or separation. Do not include child support for children reported in section B.	\$
\$	Taxable earnings from Federal Work-Study or other need based work programs earned in 2010.	\$
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income (AGI) DO NOT enter untaxed combat pay reported on the W-2 (box 12, Code Q)	

## Additional Financial Questions:

<b>Yes</b>	Do you (or parents) have income from a rental or vacation property (line 17 on 1040) If yes, you must submit a <b>Property Verification Worksheet</b> (available on our website: salemstate.edu/finaid)	<b>No</b>
<b>Yes</b>	Do you (or parents) have a zero or a negative adjusted gross income (AGI) on your (their) Tax Return? If yes you must submit an <b>Income Expense Worksheet</b> (available on our website: salemstate.edu/finaid)	<b>No</b>

## E: Signature Required

By signing this worksheet, I/we certify that all the information reported on it is complete and correct. If student is Dependent, one parent must sign this form.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature (required, if dependent)

\_\_\_\_\_  
Date

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both**