

Student Name:	Student Number:	A
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Student SSN:	Student Birth Date (month/day/year):	Student Daytime Phone Number:
Spouse Name:		Spouse USU A-Number or SSN:
Parent Name:		Parent Daytime Phone Number:

Your application has been selected by the government for review in a process called verification. Please complete this form and submit it to our office with the requested tax forms as soon as possible. If the amounts that you reported on the FAFSA do not agree with what you listed on this form and tax forms, we will update your application. **Please do not submit corrections yourself.**

Please note: We cannot award financial aid until we have a **complete** and **signed** Verification Form and copies of any required 2008 federal tax returns. If you filed for an extension on your taxes, we are unable to process your application until you file and turn in a **signed** photocopy of your final 2008 federal tax return.

1. Student Income Information:

- ▶ How much did you earn* in 2008? If none, write "0." \$ _____ .00
- ▶ Will you or did you file a federal tax return for the year 2008? Yes No
If yes, please submit a SIGNED copy of your 2008 federal tax return.
- ▶ Did you apply as married on the 2009-2010 FAFSA? Yes No
If yes, go to question 2. If no, review question 3.

2. Spouse Income Information:

- ▶ How much did your spouse earn* in 2008? If none, write "0." \$ _____ .00
- ▶ Will or did your spouse file a federal tax return for 2008?
 (Check yes if you did or did not file jointly.) Yes No
If yes, please submit a SIGNED copy of your spouse's 2008 federal tax return.

3. Parent Income Information:

Complete the following if you are considered dependent on the FAFSA. See instructions

- ▶ How much did your parents earn* in 2008? If none, write "0." Father/Stepfather: \$ _____ .00
Mother/Stepmother: \$ _____ .00
- ▶ Will or did your parents file a federal tax return for 2008? Yes No
If yes, please submit a SIGNED copy of their 2008 federal tax return.

★Earnings include wages, salaries, tips, etc. Earnings do not include losses from farms or businesses. You must report all earnings whether or not you filed a tax return. **Please report each spouse's earnings separately, do not combine individual earnings. NO EARNINGS? WRITE "0."**

Information about earnings may be on W-2 forms, and

- ▶ IRS form 1040EZ: line 1
- ▶ IRS form 1040A: line 7
- ▶ IRS form 1040: lines 7+12+18 and
- ▶ Box 14 (code A) of IRS Schedule K-1 (Form 1065).

Submitting Tax Forms - Please carefully read the following to avoid delays!

- Forms 1040, 1040A, 1040EZ, and RTFTP are valid tax returns.
- Tax forms must be **signed** in the signature block
- Form 8453 is **not** a valid tax form for verification.
- Don't have a copy of your taxes? You can order **Form 4506-T (free tax transcript)** by calling the IRS at 1-800-829-1040. Tax transcripts must be **signed** at the **bottom of the last page** of the transcript.
- **Please do not submit** copies of your state taxes, schedules, worksheets or W-2s.
- **Filed jointly?** Please include a **signed** copy of the joint return.
- **Amended tax returns?** We need a **signed** copy of the original and a **signed** copy of the amended form.

For office use only: CORR TOL OK Initial _____ Date _____ QC Initial _____

2009-10 USU Verification Form Page 2. Please enter your name and student number here.

Student Name:	Student Number:	A
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4. FAFSA Additional Income Verification

Please review the following worksheets and list any funds you (and your parents, if you're dependent) earned in any of these categories in 2008 only. **If you applied as married** on the FAFSA, report the total of both your and your spouse's dollar amounts per item on the Student & Spouse side of the worksheet tables.

Please sign here if all of the items below are \$0.00.

Item #	Parent(s)	Please use 2008 Calendar year income information.	Student & Spouse										
Additional Financial Information – Report ANNUAL amounts.													
1.		Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 -line 50 or 1040A - line 31											
2.		<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:50%; padding: 5px;">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 (or your parents') household that you listed on question 5, page 3, of this form.</td> <td style="width:50%; text-align: center; padding: 5px;">List children you paid child support to:</td> </tr> <tr> <td style="padding: 5px;"></td> <td style="padding: 5px;"> <table style="width:100%; border-collapse: collapse;"> <tr> <td style="width:50%; padding: 5px;">1.</td> <td style="width:50%; padding: 5px;">4.</td> </tr> <tr> <td style="padding: 5px;">2.</td> <td style="padding: 5px;">5.</td> </tr> <tr> <td style="padding: 5px;">3.</td> <td style="padding: 5px;">6.</td> </tr> </table> </td> </tr> </table>	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 (or your parents') household that you listed on question 5, page 3, of this form.	List children you paid child support to:		<table style="width:100%; border-collapse: collapse;"> <tr> <td style="width:50%; padding: 5px;">1.</td> <td style="width:50%; padding: 5px;">4.</td> </tr> <tr> <td style="padding: 5px;">2.</td> <td style="padding: 5px;">5.</td> </tr> <tr> <td style="padding: 5px;">3.</td> <td style="padding: 5px;">6.</td> </tr> </table>	1.	4.	2.	5.	3.	6.	
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2.	5.												
3.	6.												
3.		Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.											
4.		Taxable student grant and scholarship aid reported to the IRS in your (or your parents') adjusted gross income including grant or scholarship portions of fellowships and assistantships.											
5.		Taxable AmeriCorps benefits reported to the IRS in your (or your parents') adjusted gross income including awards, living allowances, and interest accrual payments.											
6.		Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income . Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).											
Untaxed Income - Report ANNUAL amounts.													
7.		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.											
8.		IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040 - line 28 + line 32 or 1040A - line 17.											
9.		Child support you received for all children. Don't include foster care or adoption payments.											
10.		Tax exempt interest income from IRS Form 1040 - line 8b or 1040A - line 8b.											
11.		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.											
12.		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.											
13.		Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits) Missionaries: See instructions on p. 4											
14.		Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.											
15.		Other untaxed income not reported, such as workers' compensation, 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.											
16.		Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.											

2009-10 USU Verification Form Page 4. Instructions & Notes

1. & 2. Student & Spouse Income

Report your earnings whether or not you filed a tax return. Please report each spouse's earnings separately.

If you applied as married on the 2009-2010 FAFSA, we are required to collect a **signed** photocopy of both your 2008 federal tax return and your spouse's 2008 tax return whether or not you were married in 2008.

Divorced or Separated?

If you are divorced or legally separated **after** filing jointly with your spouse for 2008, please write "divorced" or "separated" on the front of the Verification Form.

3. Parent Income Information

Report parent earnings whether or not your parent(s) filed a tax return. Please report each parent's earnings separately, do not combine individual earnings.

Divorced or Separated?

If your parents are legally separated or divorced after filing jointly for 2008, please write "divorced" or "separated" next to question 3, page 1, on the Verification Form.

Stepparents

For the purposes of financial aid, your stepparent is considered a parent. You must include your stepparent's income information.

5. Household Members

Include stepparents. Include missionaries in your parent's household if your family contributed funds to your church for their support.

If you are considered DEPENDENT on the FAFSA:

- List your name on the first line; and
- List your parents (including stepparent) even if you don't live with your parents; and
- List your parents' other children, even if they don't live with your parent(s), if (a) your parent(s) provide more than half of their support from July 1, 2009 through June 30, 2010 or (b) the children would be required to list parental information when applying for federal student aid; and
- List 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 (Do not include foster children.); and
- List the college for any household member, **excluding** your parent(s), who will be attending college at least half-time between July 1, 2009 and June 30, 2010 in a degree, diploma, or certificate program

Married Since Filing?

If you filed as a "dependent" on your FAFSA and have since married, the law **does not allow** you to update your marital status. You must complete this form as a dependent and report information about your parents' family.

Am I considered independent for financial aid purposes?

This was determined on your FAFSA. If you are unable to check any item below, you are considered "**dependent**" whether or not your parents provide you with any financial support or claim you on their taxes. If you checked *any* item you are considered "**independent.**"

- I was born before January 1, 1986.
- I am working on a masters or Ph.D. **during the 2009-10** school year.
- I am an orphan or ward of the court.
- I am a qualifying veteran of the U.S. Armed Forces.
- I applied as married on the 2009-10 FAFSA.
- I have dependents receiving more than half of their support from me.
- I am currently serving on active duty in the U.S. Armed Forces for purposes other than training.

There are other rare circumstances that may determine if you need to provide parental information. Contact our office if you have questions about your status.

If you are considered INDEPENDENT on the FAFSA:

- List your name on the first line; and
- List your spouse (if you applied as married on the FAFSA);
- List your children, if you will provide more than half of their support from July 1, 2009 to June 30, 2010; and
- List 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 (Do not include foster children.); and
- List the college for any household member, who will be attending college at least half-time between July 1, 2009 and June 30, 2010 in a degree, diploma, or certificate program.

Expecting a child?

If you or your spouse is pregnant and the child is due before June 30, 2010, include the child as a member of the household. Please indicate a due date.

**Questions? Call us at 435-797-0173.
We'll be happy to help.**

Where do I report funds received as an LDS missionary?

For the purposes of financial aid, LDS missionaries are considered clergy. Item 13 on page 2 asks you to report the funds you received while serving your mission in 2008. Do not report the amount you or your parents submitted to the LDS Church for you. Instead, report the funds you received from your mission office in 2008 to cover your expenses.