California Lutheran University – Office of Financial Aid

2011-12 Dependent Verification Worksheet

Federal Student Aid Programs

Your Free Application for Federal Student Aid (FAFSA) was selected for review in a process called "verification" by the U.S. Department of Education. In this process, the Office of Financial Aid is required by federal law to compare the information from your FAFSA with the information provided on this form and with signed copies of your and your parent(s)' 2010 Federal tax forms or other financial documents before awarding Federal aid. If there are differences between your FAFSA information and any of the documents you submit, the Office of Financial Aid may need to make corrections electronically to your FASFA so that the data may be reprocessed by the Federal Processor. **We cannot process your financial aid file until verification has been completed. As such, please provide the required documents to the Office of Financial Aid as soon as possible.** Contact the Office of Financial Aid at (805) 493-3115 during business hours if you have any questions about this form or any other documents you need in order to complete your financial aid file.

What you should do:

1. Collect your and your parent(s)' financial documents (signed 2010 Federal income tax forms, etc.).
2. **Complete both sides of this form.** Be sure that you and at least one parent whose income information is being submitted with this form **sign this worksheet.**
3. Do not leave any section blank. If you or your parent(s) did not receive income from one of the sources listed on this form, put a "0" for the amount.
4. Submit this completed worksheet, tax forms, and all other requested documents to the Office of Financial Aid.
5. The Office of Financial Aid will compare the information on this worksheet and your documents to your FAFSA and make corrections if necessary. If any additional information is required from you, you will be notified.

A. Student Information

Last Name	First Name	M.I.	CLU ID # or Social Security Number

Date of Birth	E-mail address	Current phone number (include area code)

B. Family Information

List the people in <u>your parent(s)' household</u>, including:

- yourself and your parent(s) - - including stepparent - - even if you do not live with your parents; and
- your parent(s)' other children, even if they do not live with your parent(s), if: (a) your parent(s) will provide more than half of their support from July 1, 2011 through June 30, 2012, 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 parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support from July 1, 2011 through June 30, 2012.

Write the names of all household members, including yourself, in the space(s) below: Also write in the name of the college for any family member [excluding your parent(s)], who will be attending college at least half-time between July 1, 2011 through June 30, 2012, and will be enrolled in a degree, diploma or certificate program. If you need more space, attach a separate piece of paper.

First and last name of family member	Age	Relationship to student	Will attend **<u>COLLEGE</u>** at least **half-time** in 2011-2012 year?	Name of **<u>COLLEGE</u>** the person will attend in 2011-2012 school year:	If CLU student, list school ID#
		SELF	☐ YES ☐ NO		
			☐ YES ☐ NO		
			☐ YES ☐ NO		
			☐ YES ☐ NO		
			☐ YES ☐ NO		
			☐ YES ☐ NO		
			☐ YES ☐ NO		

C. Tax Forms and Income Information

All tax filers must submit a signed copy of their 2010 Federal tax returns - IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of your tax return, call your tax preparer or the IRS (800-829-1040) for a copy.

Check the box(s) for those tax returns that you have signed and copied and are submitting along with this document:

☐ You ☐ Your mother & father (Filed a Joint Return) ☐ Your Mother ☐ Your Father

If you or your parent(s) did not file and **are not required** to file a 2010 Federal income tax return, list below the employer(s) or source(s) of income and the amounts of ALL income received in 2010 (refer to W-2 forms or other earnings statements if available).

Source of income/support/employment	Student Amount - 2010	Parent(s) Amount - 2010

Both tax filers and non-tax filers must list "Additional Financial Information" and any "Untaxed Income" - - see below. Enter zeros if no funds were received. Refer to the "Additional Financial Aid Information" and "Untaxed Income" sections of your FAFSA to answer this section:

Student	**Calendar Year 2010: January 1, 2010- December 31, 2010**	**Parent/Stepparent**
	2010 Additional Financial Information	
$	Education credits (American Opportunity, Hope and Lifetime Learning tax credits) from IRS Form 1040 - line 49 or 1040A - line 31.	$
$	Child support paid because of divorce or separation or as a result of a legal requirement. **Do not include** support for children in your or your parent(s)' household that you already reported in your 2011-2012 FAFSA.	$
$	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 or your parent(s)' adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	$
$	Combat pay or special combat pay. Only enter the amount that was taxable and included in your or your parent(s)' adjusted gross income. Do not enter untaxed combat pay.	$
$	Earnings from work under a cooperative education program offered by a college.	$
$	← **Student Total** **Parent(s) Total** →	$
	2010 Untaxed Income	
$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on your W-2 form(s) 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 - line 28 + line 32; or 1040A - line 17.	$
$	Child support received for all children. **Do not 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.	$
$	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.	$
$	Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). **Do not include** the value of on-base military housing or the value of a basic military allowance for housing.	$
$	Veterans noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.	$
$	Other untaxed income not reported elsewhere on the FAFSA, such as workers' compensation, disability, etc. Also include the first-time homebuyer tax credit from IRS Form 1040 - line 67. **Do not include** student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, 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 paid), not reported elsewhere on this form**.	XXXXXXXXXX
$	← **Student Total** **Parent(s) Total** →	$

D. Sign this Worksheet

Each person signing this worksheet certifies that all of the information reported on this form is true and accurate to the best of their knowledge. If requested, we agree to provide proof of the information that we have reported on this form. WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

_____ _____ _____ _____

Student's Signature Date Parent's Signature Date

(one parent whose income information is being submitted must sign here)