



2012 – 2013 Verification Worksheet

Federal Student Aid Programs

Independent

FORM APPROVED
OMB NO. 1845-0041

Your application was selected for review in a process called "Verification." In this process, your school will be comparing information from your application with IRS tax transcripts of your and your spouse's 2011 Federal tax data, W-2 forms or other financial documents. The law says we have the right to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, you or your school may need to make corrections electronically or by using your Student Aid Report (SAR).

Complete this verification form and submit it to your financial aid administrator as soon as possible, so that your financial aid won't be delayed. Your financial aid administrator will help you.

1. It is strongly suggested that you have your tax data transferred to FAFSA via **IRS data retrieval**. You are NOT required to submit tax forms to your school at this time. However, you may be contacted at a later date to submit IRS tax transcripts to clarify financial data on your FAFSA.
2. Complete and sign this Verification Worksheet.
3. Submit this completed Verification Worksheet and any other documents your school requests to your Financial Aid Administrator.
4. Your Financial Aid Administrator will compare information on this worksheet and any supporting documents with the information you submitted on your FAFSA application. You or your school may need to make corrections electronically or by using your SAR.

A. Student Information

_____	_____	_____	XXX – XX –	Z
Last Name	First Name	M.I.	Last 4 Digits of SSN	FAU Z Number
_____			_____	
Address (include apt. no)			Date of Birth	
_____	_____	_____	_____	
City	State	ZIP Code	Phone Number (include area code)	

B. Family Information

List the people in your household, including:

- yourself and your spouse if you have one, and
- Your children, if you provide more than half of their support from July 1, 2012 through June 30, 2013, even if they do NOT live with you, 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, 2012 through June 30, 2013.
- If the number of household members in section B of verification worksheet is different than the number of exemptions filed on taxes, student must provide a statement naming the people who he/she supports over 50% and will continue to support throughout the academic year".

Write the names of all household members in the space(s) below. Also write in the name of the college for any household member, who will be attending at least half time between July 1, 2012 and June 30, 2013, 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
Martha Jones (example)	24	Wife	City University
		Self	

C. Student's IRS Tax Transcripts Income Tax Information (all applicants)

1. Check only one box below. IRS Tax Transcripts, Puerto Rico or a foreign income tax return.

Request an IRS income tax transcript from the IRS.

- You are unmarried and your 2011 tax data will be transferred to FAFSA via the IRS data retrieval process.
- Your filing status on your 2011 Income Tax Return is **“married filing jointly”** and your 2011 tax data will be transferred to FAFSA via the IRS data retrieval process. **NOTE: If you are married and filed separately from your spouse, if you filed a Puerto Rico or foreign income tax return, you cannot use the IRS data transfer process. Copies of both you and your spouse's income tax transcript must be submitted to the Office of Student Financial Aid.**
- You are attaching an **IRS Tax Transcript** of your 2011 U.S. Income Tax Data (*due to student choosing not to or student is ineligible to use IRS Data Retrieval*). **Copies of 1040, 1040A, 1040EZ are no longer accepted.**
- You will NOT file and are NOT required to file a 2011 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See question 44 of the Free Application for Federal Student Aid (FAFSA).)

Sources of Untaxed Income	2011 Amount	Sources of Untaxed Income	2011 Amount
a. Child Support Received	\$	b. Child Support Paid	\$
c. Workman's Compensation	\$	d. Untaxed Income	\$
e. Untaxed Pensions	\$	f. Other	\$
g. Food Stamps (<i>must attach proof of eligibility for 2010 and/or 2011 tax year</i>)	\$		

3. If you did not file and are NOT required to file a 2011 Federal Income Tax Return, list below your employer(s) and any income received in 2011 (use the W-2 form or other earnings statements, if available).

Sources	2011 Income
	\$
	\$

D. Spouse's Tax Forms and Income Tax Information (if student is married)

1. Check ONLY one box below. IRS Tax Transcripts, Puerto Rico or a foreign income tax return.

Request an IRS income tax transcript from the IRS.

- Your spouse's 2011 tax data will be transferred to FAFSA via the IRS data retrieval process.
- Your filing status on your 2011 Income Tax Return is **“married filing jointly”** and your spouse's 2011 tax data will be transferred to FAFSA via the IRS data retrieval process. **NOTE: If you are married and filed separately from your spouse, if you filed a Puerto Rico or foreign income tax return, you cannot use the IRS data transfer process. Copies of both you and your spouse's income tax transcript MUST be submitted to the Office of Student Financial Aid.**
- You are attaching an **IRS Tax Transcript** of your 2011 U.S. Income Tax Data (*due to spouse choosing not to or spouse is ineligible to use IRS Data Retrieval*). **Copies of 1040, 1040A, 1040EZ are no longer accepted.**
- Your spouse will NOT file and is NOT required to file a 2011 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See Question 44 of the FAFSA.)

Sources of Untaxed Income	2011 Amount	Sources of Untaxed Income	2011 unt
a. Child Support Received	\$	b. Child Support Paid	\$
c. Workman's Compensation	\$	d. Untaxed Income	\$
e. Untaxed Pensions	\$	f. Other	\$
g. Food Stamps (<i>must attach proof of eligibility for 2010 and/or 2011 tax year</i>)	\$		

3. If your spouse did NOT file and is NOT required to file a 2010 Federal Income Tax Return, list below your spouse's employer(s) and any income they received in 2010 (use the W-2 form or other earnings statement, if available).

Sources	2011 Income
	\$
	\$

E. Sign this Worksheet

Each person signing this form certifies that all the information reported on it is complete and correct.

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

Student Date

Spouse (optional) Date



**Florida Atlantic University
Office of Student Financial Aid
Additional Asset Information**

Boca Campus

777 Glades Road
Building SU 80, Room 233
Boca Raton, FL 33431-0991
Tel: (561) 297-3530

Davie Campus

3200 College Avenue
Building LA 122
Davie, FL 33314
Tel: (954) 236-1229

Jupiter Campus

Office of Student Financial Aid - SR 134
5353 Parkside Drive
Jupiter, FL 33458
Tel: (561) 799-8697

Port St. Lucie Campus

500 NW California Blvd.
Port St. Lucie, FL 34986
Tel: (772) 873-3301

Website: www.fau.edu/financialaid

Name _____

Academic Year 2012 – 2013

Address: _____

City/State/Zip _____

FAU Z NUMBER **Z** _____

The Office of Student Financial Aid needs additional information to complete your verification.

Student Asset Information (This section MUST always be completed by the student)

1. As of today, what is your (and spouse) total current balance of cash, savings, and checking accounts? \$ _____

2. As of today, what is the net worth of your (and spouse) investments, including real estate (not your home)? Such as installment and land sale contracts, including mortgages you hold from the sale of property, CDs, trust funds, money market funds, mutual funds, stocks, stock options, bonds other securities, Education IRAs, college saving plans, Coverdell savings accounts, commodities, precious and strategic metals, partnerships, S-corporations, etc. \$ _____

****Net worth means current value minus debt.****

3. As of today, what is the net worth of your (and spouse) current business and/or investment farms? (Include land, buildings, inventories, equipment, machinery, etc.) **Note:** Business value does not include the value of a small business that you (or spouse) own/control and that has 100 or fewer full-time or full-time equivalent employees. \$ _____

Student Signature

Date