

### 2009 – 2010 Independent Student Verification Worksheet

Your application was selected for a process called “verification”. This office will be comparing information from your application with signed copies of your and your spouse’s 2008 Federal tax forms, W-2s, and other documents, as applicable. Federal law allows this process, and requires that the process be completed prior to awarding federal financial aid. If there are differences between your application and your financial documents, this office will make corrections as necessary. ***This may affect your eligibility for financial aid especially if you estimated your tax information for FAFSA filing purposes.***

#### Section A: Student Information

Last Name		First Name	MI	Student ID#
Address				Social Security Number
City	State	Zip Code	Area Code and Phone Number	

#### Section B: Family Information

List the people in your household, including yourself and your spouse. Also include your children if you will provide more than half of their support between July 1, 2009 and June 30, 2010. You should also include other people if they now live with you, you provide more than half of their support, and you will continue to provide more than half of their support between July 1, 2009 and June 30, 2010.

Write the names of all household members in the space(s) below. Also write the name of the college for any household member who will be attending college at least half-time between July 1, 2009 and June 30, 2010.

Full Name	Age	Relationship	College or University
		<i>Self</i>	<i>Christopher Newport University</i>

#### Section C: Asset Information

Asset	Student	Spouse
Total current balance of cash, savings and checking accounts.		
Net worth of investments. Note that investments include real estate (but not the home you live in), trust funds, money market funds, mutual funds, CDs, stocks, stock options, bonds, other securities, etc. Qualified educational benefits such as Coverdell accounts or 529 accounts should be reported as assets of the student, including all accounts owned by the student and any other member of the household (i.e., students not yet in college). <b>DO NOT</b> include retirement plans. Net worth means the current value minus investment debt (debt related to the investment only).		
Net worth of businesses or investment farms. Do not include the value of a small business if your family owns and controls more than 50 percent of the business and the business has 100 or fewer full-time or full-time equivalent employees. Do not include the value of a family farm that your family lives on and operates.		

**Section D: Income and Tax Information****YOU MUST COMPLETE THIS SECTION BY PROVIDING DOCUMENTATION OR INITIALING BELOW.****TAX FILERS:**Submit **signed copies** of your and your spouse's 2008 income tax returns **and** supporting schedules.

Acceptable documents are:

Federal 1040, 1040A or 1040EZ **and all schedules.**

Tax transcript provided by the IRS.

*Simplified copies provided by electronic filing software are not acceptable.***NON TAX FILERS:**\_\_\_\_\_ Initial here if the student **did not** file and **was not required** to file a tax return for 2008.\_\_\_\_\_ Initial here if the spouse **did not** and **was not required** to file a tax return for 2008.**W-2s MUST BE PROVIDED FOR ALL PERSONS NOT SUBMITTING A TAX RETURN FOR 2008.**\_\_\_\_\_ Initial here if the student **did not work** and **does not have** a 2008 W-2.\_\_\_\_\_ Initial here if the spouse **did not work** and **does not have** a 2008 W-2.**Section E: Untaxed Income****DO NOT LEAVE BLANK!!!**

Source of 2008 Untaxed Income	Student	Spouse
Payments to tax-deferred pension and savings plans, including amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S.		
IRA deductions and payments to self-employed SEP, SIMPLE, Keough and other qualified plans from IRS Form 1040-line 28 + line 32 or 1040A-line 17.		
Child support received for all children. Don't include foster care.		
Tax exempt interest 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.		
Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A-lines (12a minus 12b). Exclude rollovers.		
Housing, food and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits).		
Veterans noneducation benefits such as Disability, Death Pension, or Dependency and Indemnity Compensation or VA Educational Work-Study.		
Other untaxed income not reported, such as workers' compensation, disability, etc. <b>Don't include</b> Social Security or combat pay.		
Money received, or paid on your behalf (i.e., bills) not reported elsewhere on this form.		

**Section F: Additional Financial Information****DO NOT LEAVE BLANK!!!**

Source of 2008 Information	Student	Spouse
Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 or 1040A-line 31.		
Child support paid because of divorce or separation. Don't include support for children in the household.		
Taxable earning from need-based employment programs such as Federal Work-Study.		
Student grant and scholarship aid <b>reported to the IRS in adjusted gross income.</b>		
Combat pay or special combat pay. <b>Only enter the amount that was taxable and reported in adjusted gross income.</b>		

**By signing this worksheet, we certify that all the information reported is complete and correct. We understand that purposely giving false or misleading information may result in fines and/or jail terms.**

\*\*Please note: The CNU Office of Financial Aid may, at their discretion, request information from non-tax filers substantiating how routine costs of living were provided for the 2008 calendar year. We may also request additional documentation.

Signature: \_\_\_\_\_  
(Student)

Date: \_\_\_\_\_

Signature: \_\_\_\_\_  
(Spouse- optional)

Date: \_\_\_\_\_