

Verification Worksheet for *Dependent Students*
2008-2009

Your application was selected for review. Rutgers will be comparing the information on this worksheet with the information you submitted on your Free Application for Federal Student Aid (FAFSA). If there are differences, Rutgers will update your data with the federal processor. Please respond promptly to avoid delays in processing your financial aid.

What you should do:

1. Collect your and your parent(s) financial documents (signed Federal income tax forms, all schedules).
2. Carefully review, complete and sign the worksheet.
3. Do not leave any item blank. Enter "0" if item does not pertain to you.
4. Return the signed, completed worksheet, tax forms and related documents to your regional Office of Financial Aid.

Rutgers must review the requested information under the financial aid program rules (34 CFR, Part 668).

A. Student Information - - () _____
 Social Security Number Date Of Birth (DOB) School # Area Code and Phone Number
 Your Social Security Number is required to process your Federal Student Aid.

 Last Name First Name M.I. Address Apt. #

 Email City State ZIP

B. Family Information - List the people in your parents' household, include:

- yourself and your parent(s) (including stepparent) even if you do not live with your parent(s), and
- your parents' other children, even if they don't live with your parent(s), if (a) your parents provide more than half of their support from July 1, 2008 through June 30, 2009, 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 parents, and your parents provide more than half of their support and will continue to provide more than half of their support.

Write the names of all household members. Indicate the name of the college for ANY household member, excluding your parent(s), who will attend college at least half-time between July 1, 2008 and June 30, 2009, and who will be enrolled in an undergraduate degree, diploma, or certificate program. Attach a separate page, if necessary.

Full Name	Age	DOB	Relationship	College

C. Parental Tax Forms and Income Information

1. CHECK ONE BOX: Tax returns include the 2007 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico, freely associated state, or foreign tax return. If your parent(s) did not keep a copy of the tax return, request a copy from the tax preparer or request an Internal Revenue Service form that lists tax account information.

- | | |
|---|--|
| <input type="checkbox"/> Signed tax return(s) enclosed | <input type="checkbox"/> Puerto Rican tax return enclosed |
| <input type="checkbox"/> Signed tax return(s) will be submitted to Rutgers by _____(date) | <input type="checkbox"/> Foreign tax return enclosed |
| <input type="checkbox"/> Parent(s) will not file and are not required to file a 2007 Federal income tax return. | <input type="checkbox"/> Freely Associated State return enclosed |

2. If your parent(s) did not file and are not required to file a 2007 Federal or foreign income tax return, list below any of your parent(s) employer(s) and any income, or any in-kind support, they received in 2007 (attach the W-2 form or other earnings statements).

Sources	2007 Amount
	\$
	\$
	\$

D. Worksheets. Please report annual amounts for the calendar year 2007.

Worksheet A

Student		Parents
\$	Earned income credit from IRS Form 1040—line 66a; 1040A—line 40a; 1040EZ—line 8a	\$
\$	Additional child tax credit from IRS Form 1040—line 68 or 1040A—line 41	\$
\$	Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps or subsidized housing.	\$
\$	Social Security benefits received, for all household members as listed in your parent's household (Section B) that were not taxed (such as SSDI). Report benefits paid to parents in the Parents column, and benefits paid directly to you in the Student column.	\$
Total for Worksheet A		
\$		\$

Worksheet B

Student		Parents
\$	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.	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040—total of lines 28 + 32 or 1040A—line 17	\$
\$	Child support you received for all children. Don't include foster care or adoption payments.	\$
\$	Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b	\$
\$	Foreign income exclusion from IRS Form 2555—line 45 or 2555EZ—line 18	\$
\$	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.	\$
\$	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.	\$
\$	Credit for federal tax on special fuels from IRS Form 4136—line 17—nonfarmers only	\$
\$	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 & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances	\$
\$	Any other untaxed income or benefits not reported elsewhere on Worksheets A and B, such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Tax filers only: report combat pay not included in AGI.	
\$	Don't include student aid, Workforce Investment Act educational benefits, combat pay if you are not a tax filer, or benefits from flexible spending arrangements, e.g. cafeteria plans.	\$
\$	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	XXXXXXXXXXXXXX
Total for Worksheet B		
\$		\$

Worksheet C

Student		Parents
\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040—line 49 or 1040A—line 31	\$
\$	Child support your parent(s) paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your (or your parents') household.	\$
\$	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 parents') adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	\$
Total for Worksheet C		
\$		\$

E. Signatures: Both student and parent required to sign.

We certify that all the information reported on this worksheet is complete and correct.

Student _____ Date _____ Parent _____ Date _____

_____-_____-_____
Social Security Number

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