

# 2008 - 2009 Verification Worksheet

## Federal Student Aid Programs

**DEPENDENT**

The federal government selected your application for review in a process called "Verification." In this process, Carleton is required to compare information from your application with signed copies of your and your parent(s)' 2007 federal tax forms and W-2 forms or other financial documents. Federal regulations require us to collect and compare this information before awarding federal aid. If there are differences between your application information and your financial documents, Carleton may need to make corrections electronically.

Complete this **Verification Worksheet** and submit it to our office **within two weeks** so that your financial aid won't be delayed. We are unable to award you aid until verification is complete. If you have any questions, do not hesitate to contact our office at 507-222-4138 or financialaid@carleton.edu.

**What you should do:**

1. **Complete, sign, and submit** this worksheet – you and at least one parent must sign.
2. If you have not already done so, submit your and your parent(s)' **signed** 2007 Federal income tax forms, W-2 forms, etc. and any other requested documents to the above address.

**A. Student Information**

Last Name	First Name	M.I.	Social Security 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 parents' household; include:

- yourself and your parent(s) (including stepparent) even if you don't live with your parents, and
- your parents' other children, even if they don't live with your parent(s), if (a) your parents will 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
- include other people only 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, 2008 through June 30, 2009.

Write the names of all household members in the space(s) below. Also write in the name of the college for any household member, excluding your parent(s), who will be attending college at least half time between July 1, 2008 and June 30, 2009 in a program that leads to a college degree or certificate. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
<i>Marsha Jones (example)</i>	<i>19</i>	<i>Sister</i>	<i>City University</i>
		Self	Carleton College

**C. Student's Tax Forms and Income Information (all applicants)**

- Check one box only. Tax returns include the 2007 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, request a copy from your tax preparer or request an Internal Revenue Service form that lists tax account information.
  - Check here if you are attaching a **signed** copy of your tax return.
  - Check here if you have already submitted **signed** copies of your tax return and W-2s to Carleton.
  - Check here if you will not file and are not required to file a 2007 U.S. Income Tax Return.
- Funds received for child support and other untaxed income. (See Worksheets A & B of the Free Application for Federal Student Aid - FAFSA).

Child support <b>received</b> for all children. Don't include foster care or adoption payments.	\$
IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS 1040—line 28 + line 32 or 1040A—line 17.	\$
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.	\$
Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps or subsidized housing.	\$
Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.	\$
Untaxed portions of IRA distributions or pensions from IRS Form 1040—lines 15a minus 15b or lines 16a minus 16b or from IRS Form 1040A—lines 11a minus 11b or lines 12a minus 12b. Exclude rollovers. If negative, enter zero.	\$
Social Security benefits that were not taxed (such as SSI). Report benefits paid directly to the student.	\$
Other	\$

- If you did not file and are not required to file a 2007 federal income tax return, list below your employer(s) and **any income** received in 2007.

Sources (use the W-2 form or other earnings statements)	Amount
	\$
	\$
	\$

**D. Parent(s)' Tax Forms and Income Information**

- Check one box only. Tax returns include the 2007 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If your parent(s) did not keep a copy of their tax return, request a copy from the tax preparer or request an Internal Revenue Service form that lists tax account information.
  - Check here if you attaching a **signed** copy of your parent(s)' tax return.
  - Check here if you have already submitted **signed** copies of your parent(s)' tax return and W-2s to Carleton.
  - Check here if your parent(s) will not file and are not required to file a 2007 U.S. Income Tax Return.
- Funds received for child support and other untaxed income. (See Worksheets A & B of the Free Application for Federal Student Aid).

Child support <b>received</b> for all children. Don't include foster care or adoption payments.	\$
IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS 1040—line 28 + line 32 or 1040A—line 17.	\$
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.	\$
Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps or subsidized housing.	\$
Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.	\$
Untaxed portions of IRA distributions or pensions from IRS Form 1040—lines 15a minus 15b or lines 16a minus 16b or from IRS Form 1040A—lines 11a minus 11b or lines 12a minus 12b. Exclude rollovers. If negative, enter zero.	\$
Social Security benefits that were not taxed (such as SSI). Report benefits paid to parents for all household members.	\$
Other	\$

- If your parent(s) did not file and are not required to file a 2007 federal income tax return, list below your parent(s)' employer(s) and **any income** they received in 2007.

Sources (use the W-2 form or other earnings statements)	Amount
	\$
	\$
	\$

**E. Sign this Worksheet**

By signing this worksheet, we certify that all the information reported is complete and correct. Student and at least one parent must sign.

\_\_\_\_\_  
Student Signature Date

\_\_\_\_\_  
Parent Signature Date

**Send to:**  
Carleton College  
Student Financial Services  
One North College Street  
Northfield, MN 55057

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