

**Wheeling Jesuit University  
2008-2009 Independent Verification Form**

Name \_\_\_\_\_ SS# \_\_\_\_\_

**Taxable Income**

For 2007, have you and/or spouse (if married) filed a Federal income tax return?

I (we) have already filed \_\_\_\_\_ I (we) will file, but have not yet filed \_\_\_\_\_  
I (we) will not file \_\_\_\_\_

What Federal income tax return did you file or will you file for 2007?

IRS 1040 \_\_\_\_\_ IRS 1040A/EZ/Telefile \_\_\_\_\_

**Household Information**

Please list below the people that you (and/or spouse) will support between July 1, 2008 and June 30, 2009. Include your spouse (if married) and anyone who will live with you (and/or spouse) and who will receive more than half their support from you between July 1, 2008 and June 30, 2009. For dependents reported in household information, please indicate the college **they will attend at least half-time in a degree seeking program from July 1, 2008 through June 30, 2009.**

| <u>Full Name</u> | <u>Relationship to Student</u> | <u>Age</u> | <u>College in 2008-2009</u> |
|------------------|--------------------------------|------------|-----------------------------|
| 1. XXXXXXXXXXXXX | Student (You)                  | XX         | Wheeling Jesuit University  |
| 2. _____         | _____                          | ___        | _____                       |
| 3. _____         | _____                          | ___        | _____                       |
| 4. _____         | _____                          | ___        | _____                       |
| 5. _____         | _____                          | ___        | _____                       |
| 6. _____         | _____                          | ___        | _____                       |
| 7. _____         | _____                          | ___        | _____                       |

**Certification**

By signing this form, I (we) certify that all information reported on this statement (front and back) and on the Free Application for Federal Student Aid (FAFSA) is complete and accurate.

\_\_\_\_\_  
Student's Signature                      Spouse's Signature                      Date

\*\*over\*\*

## Untaxed Income/Benefits

Please complete Worksheets A, B, and C. If a line item does not pertain to you (and/or spouse), place a zero (0) in the amount column. This section verifies information in Questions 40, 41 and 42 on the FAFSA.

### Worksheet A

**Student (and spouse)**

**Calendar Year 2007**

\$ \_\_\_\_\_ Earned income credit from IRS Form 1040-line 66a; 1040A-line 40a; 1040EZ-line 8a; or  
Telefile-line L

\$ \_\_\_\_\_ 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.

\_\_\_\_\_ Social Security benefits received, for all household members as reported in Question 90, that were  
not taxed (such as SSI). Report benefits paid directly to student (or spouse) in the Student/Spouse  
column.

\$ \_\_\_\_\_ **Total student (and spouse if married) Question 40**

### Worksheet B

**Student (and spouse)**

**Calendar Year 2007**

\$ \_\_\_\_\_ Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings),  
including amounts reported on the W-2 Form in Box 12a, 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 **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 43 or 2555EZ-line 18

\$ \_\_\_\_\_ Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or  
1040A-lines (12a minus 12b) excluding rollovers.

\$ \_\_\_\_\_ Credit for federal tax on special fuels from IRS Form 4136-line 20--(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

\_\_\_\_\_ Other untaxed income 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 adjusted gross income (Q35 and Q79).  
**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.

\$ \_\_\_\_\_ Cash **received**, or any money paid on your behalf, not reported elsewhere on this form

\$ \_\_\_\_\_ **Total student (and spouse if married) Question 41**

### Worksheet C

**Student (and spouse)**

**Calendar Year 2007**

\$ \_\_\_\_\_ 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 or as a result of legal requirement. Do not  
include support for children in your household, as reported in question 90 (or question 66 for your  
parents).

\$ \_\_\_\_\_ Taxable earnings from need-based employment programs, such as Federal Work-Study and need-  
based work programs employment portions of fellowship 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 student (and spouse if married) Question 42**

