The University of Tennessee at Martin

Office of Student Financial Assistance
205 Administration Building
Martin, TN 38238

Phone: 731-881-7040
1-800-829-8861
Do NOT fax

2009-2010 Verification Worksheet
Federal Student Aid Programs

Independent Student

Your application was selected by the U.S. Dept. of Education for "Verification". In this process, UTM will be comparing information from your application with signed copies of your and your spouse's 2008 Federal tax forms, W-2 forms, and/or other financial documents. If there are differences between your application information and your financial documents, it may be necessary for your information to be reprocessed.

Complete this verification worksheet and submit it to the financial aid office as soon as possible, so that your financial aid will not be delayed.

What you should do

1. Attach signed copies of your and your spouse's financial documents (Federal income tax forms, W-2 forms, etc).
2. Complete and sign the worksheet.
3. Take, mail, or email (do not fax) the completed worksheet, tax forms, and any other documents to the financial aid office.

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

A. Student Information

Last name First name M.I. ________________

Social Security Number or Student ID ________________

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, include:

- yourself and your spouse if you have one, and
- your children, if you provide more than half of their support from July 1, 2009 through June 30, 2010.
- 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 from July 1, 2009, through June 30, 2010.

Write the names of all household members. Also write in the name of the college for any household member who will be attending college at least half-time between July 2, 2009 and June 30, 2010, 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
Missy Jones **(example)**	24	Wife	Central University
		Self	

C. Student's / Spouse's Tax Forms and Income Information (all applicants) Independent

1. Place an 'X' in one box below for student and one for spouse, if separate returns were filed. Tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign tax return. If you did not keep a copy of the tax return, request a copy from your tax preparer or a copy from the Internal Revenue Service.

Student	Spouse	
☐	☐	I have already completed my 2008 IRS income tax return; a signed copy is attached.
☐	☐	I will file, but I have not yet completed my return; a signed copy will be mailed when completed.
☐	☐	I will not file an IRS income tax return

2. **Sources of Untaxed Income** **2008 Amounts**

	Student	Spouse
Disability payment received: (Do NOT include Social Security Income)	$	$
Child support received for all children. Don't include foster care or adoption payments	$	$
Housing, food and other living allowances paid to member of the military, clergy, and others	$	$
Veterans' non-education benefits such as Disability, Death Pension, or Dependency and Indemnity Compensation and/or VA Educational Work-Study allowances	$	$
Any other untaxed income or benefits not reported elsewhere	$	$

3. **Sources of Income**

If you did not file and are not required to file a 2008 Federal income tax return, list below your employer(s) and any income received in 2008 (use the W-2 form or other earnings statements if available).

Source:	Student	Spouse
	$	$
	$	$

4. **Investment Net Worth**

	Student	Spouse
Enter the **net worth of your investments**. Net worth means current value minus debt. Investments include real estate (do not include the home you live in), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, CDs, stocks, bonds, education IRAs, college savings plans, installment and land sale contracts (including mortgages held), commodities, etc. Do **not** include cash, savings, checking accounts, the value of life insurance and retirement plans or the value of prepaid tuition plans.	$	$
Enter the **net worth of your business and/or investment farm. Do not include** the value of a family farm that you (your spouse) live on and operate. Do not include the value of a small business that you (your spouse) own and control that has 100 or fewer full-time or full-time equivalent employees.	$	$

5. **Exclusions from Income**

	Student	Spouse
Child support paid because of divorce or separation	$	$
Taxable earnings from Federal Work-Study or other need-based work programs	$	$
Student grant, scholarship, fellowship, and assistantship **aid**, including AmeriCorp award, that was **reported to the IRS** in your (or your spouse's) adjusted gross income.	$	$
Combat pay or special combat pay. Only enter the amount that was taxable and included in your **adjusted gross income**. Do **NOT** enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	$	$

D. Sign this Worksheet

By signing this worksheet, we certify that all the information reported on it is complete and correct.

____

Student Date

____

Spouse Date

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