

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 Program

Dependent 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 parent(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. Collect your and your parent(s) financial documents (**signed** copies of 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 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 provide more than half of their support from July 1, 2009 through June 30, 2010, or (b) the children would be required to provide parental information when applying for Federal Student Aid.
- other people if they now live with your parents, your parents provide more than half of their support, and your parents 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, **excluding your parent(s)**, 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)	18	Sister	Central University
		Self	

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

**Dependent**

1. Place an 'X' in one box below for the student and one box for the parent(s). Tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ, TeleFile Tax Record, 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      Parent**



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**

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

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).

<b>Source:</b>	<b>Student</b>	<b>Parent</b>
	\$	\$
	\$	\$

4. **Investment Net Worth**

	<b>Student</b>	<b>Parent</b>
Enter the <b>net worth of your investments</b> . 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, etc. Do <b>not</b> include cash, savings, checking accounts, the value of life insurance and retirement plans or the value of prepaid tuition plans.	\$	\$
Enter the <b>net worth of your business and/or investment farm</b> . Do <b>not</b> include the value of a family farm that you (or your parents) live on and operate. Do not include the value of a small business that you (or your parents) own and control and that has 100 or fewer full-time or full-time equivalent employees.	\$	\$

5. **Exclusions from Income**

	<b>Student</b>	<b>Parent</b>
<b>Child support paid</b> because of divorce or separation	\$	\$
<b>Taxable earnings from Federal Work-Study</b> or other need-based work programs	\$	\$
Student grant, scholarship, fellowship, and assistantship <b>aid</b> , including AmeriCorp award, that was <b>reported to the IRS</b> in your (or your parent's) adjusted gross income.	\$	\$
Combat pay or special combat pay. Only enter the amount that was taxable and included in your <b>adjusted gross income</b> . Do <b>NOT</b> 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. At least one parent must sign.

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

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

**WARNING:**

**If you purposely give false or misleading information on this worksheet, you may be fined \$20,000, sent to prison, or both.**