



Student Name: _____

WIN #: _____

Address: _____

Phone: _____

2008-09 Independent Verification Worksheet

Your application was selected for review in a process called "Verification". In this process, Western will be comparing information from your Student Aid Report (SAR) with signed copies of yours (and if married, your spouse's) 2007 Federal tax forms and/or other financial documents. Federal law requires that this be done before awarding federal aid. If there are differences between your application information and your financial documents, it may be necessary for our office to make corrections electronically through the federal processor. The corrections may result in an increase or decrease in your eligibility for financial aid programs.

What you should do - Complete this worksheet, attach signed copies of yours (and your spouse's) 2007 Federal income tax returns, sign this form and submit all documents to Western's financial aid office. **Your documentation must be received in our office at least 30 days prior to your last date of enrollment for the 2008-09 school year (June 26, 2008 – June 24, 2009).**

SECTION A: STUDENT'S HOUSEHOLD SIZE:

List the people in your household, include:

- yourself, and your spouse if you have one, and
- your children, if you will provide more than half of their support from July 1, 2008 through June 30, 2009 and
- other people if they now live with you, and you 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

Print the name, age, and relationship of each household member. Also print the name of the college for any household member, who will be attending college at least half time between July 1, 2008 and June 30, 2009 in a degree, diploma or certificate program.

NAME	AGE	RELATIONSHIP	NAME OF COLLEGE
1.		Student	Western Michigan University
2.			
3.			
4.			

If you need more space, attach a separate page

SECTION B: STUDENT (AND IF MARRIED, SPOUSE) INCOME INFORMATION

TAX FILERS – If you (and your spouse, if married) filed a 2007 Federal Income Tax Return (Form 1040, 1040A, 1040EZ, or Forms 8879 or 8453 with signed printout of tax information), **attach signed copies of the front and back of the tax return.** (If you have already submitted the tax return, indicate date submitted _____). Write the student's name and WIN number on the top of each attached page. If you and your spouse filed separate tax returns, please attach a copy of each tax return. *If you need a copy of your federal tax return, call IRS at 1-800-829-1040 and request a "Tax Return Transcript".* **Note:** If you or your spouse are required to file a tax return but have not yet filed, please submit this completed form and your tax return as soon as you have filed. (note: your aid will not be processed until the Tax Return has been received). State Income Tax Returns are not acceptable and will not be processed.

See Next Page for more information

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NON-TAX FILERS ONLY Complete the box below:

- I (the student) will not be filing a 2007 Federal Income Tax Return because I am not required by the IRS to file a tax return. List your income in the table below.
- I (the spouse) will not be filing a 2007 Federal Income Tax Return because I am not required by the IRS to file a tax return. List your income in the table below. **If the total amount of income or benefits received is zero, please attach an explanation of all sources of income or support used to meet your basic living needs of rent, food, clothing, medical, etc.**

Sources of Income or Taxable Benefits for 2007	Student	Spouse
Employment	\$	\$
Retirement, Pensions, Annuity Income	\$	\$
Social Security	\$	\$
Unemployment	\$	\$
Other:	\$	\$

SECTION C: WORKSHEET INFORMATION (Student and spouse fill out this section)

WORKSHEET A: Do not leave any blanks; use zero "0" or N/A if not applicable.

Sources of 2007 Year Untaxed Income	Student	Spouse
Social Security Benefits for <u>all</u> household members that were <u>not</u> taxed	\$	\$
Welfare Benefits, including TANF	\$	\$

WORKSHEET B: Do not leave any blanks; use zero "0" or N/A if not applicable.

Other Sources of 2007 Year Untaxed Income	Student	Spouse
Child support <u>received</u> for all children.	\$	\$
Payments to tax-deferred pension and savings plans 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	\$	\$
Housing, food, & other living allowances paid to members of the military, clergy & others		\$
Money, received, or paid on your behalf (e.g. bills) not reported elsewhere on this form	\$	\$

WORKSHEET C: Do not leave any blanks; use zero "0" or N/A if not applicable.

Income Exclusions during 2007 Year	Student	Spouse
Child support <u>paid</u> because of divorce or separation. Don't include support for children in your household.	\$	\$
Taxable earnings from Federal Work-Study or other need-based work programs that was reported to IRS in your 2007 federal adjusted gross income.	\$	\$
Student grant, scholarship, fellowship, assistantship and AmeriCorps aid reported to IRS in your 2007 federal adjusted gross income.	\$	\$

SECTION D: STUDENT AND SPOUSE SIGNATURE CERTIFICATION: (Student and spouse fill out this section)

By signing this worksheet, I (we) certify that all the information reported on it is complete and correct. I (we) further understand that purposely giving false or misleading information regarding eligibility for Federal or State aid may result in fines, jail terms or both. If married, spouse's signature is optional.

Student Signature _____ Date _____ Spouse signature _____ Date _____

Please check before mailing. Did you include your SIGNED tax return? Write the student's name and WIN on the top of each page? Complete the address portion at the top of page one? Missing information may delay the processing of your aid package.

Please mail documents to: Western Michigan University, Student Financial Aid,
1903 West Michigan Avenue, Kalamazoo, MI 49008-5337