

# MERCER UNIVERSITY

## OFFICE OF STUDENT FINANCIAL PLANNING VERIFICATION WORKSHEET 2010 - 2011

### Student's Name and Address:

\_\_\_\_\_  
Last First M.I. Nickname Social Security Number or Mercer ID

\_\_\_\_\_  
Number & Street (Include Apt. No.) Date of Birth

\_\_\_\_\_  
City State ZIP Code E-mail Address

\_\_\_\_\_  
Home Phone Number (Include Area Code)

Your 2010 - 2011 Free Application for Federal Student Aid has been selected for review in a process called "Verification". As such, you are required to complete the appropriate sections of this form and return it, along with **signed** copies of your (and your parents' if dependent) 2009 Federal Income Tax Returns and all 2009 W-2 forms. Acceptable tax forms include: 1040, 1040A, 1040EZ, or foreign income tax return. **Electronic Form 8453 is NOT acceptable.** If you did not keep a copy of your federal return, you must request a tax transcript from the IRS (1-800-829-1040). Copies of your 2009 W-2's can also be obtained by contacting your employer(s). **Please include the student's Social Security number or Mercer ID on all documents you submit to our office to prevent any confusion.**

**TO RECEIVE FEDERAL STUDENT FINANCIAL AID, YOU ARE REQUIRED BY LAW TO COMPLETE THE VERIFICATION PROCESS.**

### Section A: Student's 2009 Income Information (and spouse's if married)

This section must be completed by the student.

1) Check and attach a copy of your (and your spouse's if applicable) **2009 signed** Federal Tax Return and all W-2's. See instructions above for acceptable forms.

2) If you were not required to file, check here:  If you are married, and your spouse was not required to file, check here:

If student or spouse were not required to file a return, but worked in 2009, list employers and amount(s) earned below and **attach copies of all W-2's.**

\_\_\_\_\_ \$ \_\_\_\_\_ .00

\_\_\_\_\_ \$ \_\_\_\_\_ .00

3) Complete Section B if you meet the stated "independent student" criteria OR complete Section C if you are a dependent student.

4) Complete Section D on page 3 of this form for student (and spouse if applicable) and sign the statement following the sections.

#### Please Note:

- All required sections must be completed (including Section D), entering "0" where applicable
- Signatures are required on this document as well as on copies of Federal tax forms
- Copies of 2009 Federal Tax returns AND W-2's must be enclosed
- W-2's must be provided even if no tax return was filed
- Any incomplete Verification Documents will be returned for completion
- No federal aid will be disbursed to the student's account until verification is complete.
- A hold will be placed on future registrations until verification is complete.
- If there are differences between your application information and your financial documents, your financial aid package may be revised.

1400 Coleman Avenue • Macon, Georgia 31207-0001

Local (478) 301-2670 • Fax (478) 301-2671

Toll Free in Georgia (800) 342-0841 • Toll Free Out of State (800) MERCER-U (637-2378)

<http://merceraid.com/macon>

**Section B: Independent Student's Household**

This section is **only** to be completed by students for whom one or more of the following is true:

- born before January 1, 1987
- will be working on a master's or doctorate degree during the school year 2010 - 2011
- married as of the day you completed the FAFSA
- are a veteran of the U.S. Armed Forces
- have children or other dependents who will receive more than half of their support from you now through June 30, 2011
- currently serving on active duty in the U.S. Armed Forces for purposes other than training
- are an emancipated minor or were in foster care or legal guardianship as determined by a court in your state of legal residence
- were considered to be homeless on or after July 1, 2009 by a local, state, or federal agency
- are an orphan or were in foster care or a ward of the court at any time since age 13

List the people in your household: include (a) yourself, your spouse if married; (b) your children, if you will provide more than half of their support from July 1, 2010 through June 30, 2011 and (c) any 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, 2010 through June 30, 2011. Also, write in the name of the college for any family member who will be attending college at least half-time between July 1, 2010 and June 30, 2011, **and** will be enrolled in a degree or certificate program. Include yourself.

Name of Family Member	Age	Relationship to Student	College for 2010 - 2011
_____	_____	self	Mercer University
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**Section C: Parent's 2009 Income and Household Information (include spouse of parent)**

If your parents are both living and married to each other, provide information about them. If your parents are divorced or separated, provide information about the parent you lived with more during the past 12 months and that parent's spouse, if married. If you did not live with one parent more than the other, give information about the parent who provided more financial support during the last 12 months and that parent's spouse, if married. (Note that grandparents and legal guardians are not parents.)

**\*\* IF LOW OR NO INCOME IS REPORTED, ADDITIONAL DOCUMENTATION MAY BE REQUIRED \*\***

1) Check and attach a copy of your parent(s) or step-parent(s) **2009 signed** Federal Tax Return(s) and all W-2's. See page 1 for acceptable forms.

2) If your parent(s) or step-parent(s) were not **required** to file, check here:

If your parent(s) or step-parent(s) were not required to file a return, but worked in 2009, list employers and amount(s) earned below and **attach copies of all W-2's**.

_____	_____	_____	.00
_____	_____	_____	.00

**3) People in Parent's/Stepparent's Household**

Include in your parent's/stepparent's household: (a) your parent(s) (including stepparents) and yourself, even if you did not live with your parents; (b) your parents' other children, even if they do not live with your parents, **if** (1) your parents will provide more than half of their support from July 1, 2010 through June 30, 2011, or (2) they would be required to give parental information when applying for Federal student aid; and (c) other people if they now live with your parents, and your parents will provide more than half of their support and will continue to do so from July 1, 2010 through June 30, 2011. Also, write in the name of the college for any family member (excluding parents) who will be attending college at least half-time between July 1, 2010 and June 30, 2011, **and** will be enrolling in a degree or certificate program. If you need more space, attach a separate page. **This household size section must be completed if the student does not meet the independency criteria in Section B.**

Name of Family Member	Age	Relationship to Student	College for 2010 - 2011
_____	_____	self	Mercer University
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

4) Complete Section D on page 3 of this form for parent(s) and step-parent(s) and sign the statement following the section.

**Section D: Additional Financial Information and Signatures**

How much, if any, of each of the following did you receive for the Calendar Year 2009?

**NOTE: You must enter an amount or zero (for both student and parent(s) or spouses) or the form will be returned to you**

Student (and spouse)

Report Annual Amounts

Parent(s) (and step-parent)

**Untaxed Income**

\$ _____	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including amounts reported on the W-2 Form in Boxes 12a through 12d, 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 lines 28 + 32 or 1040A-line 17	\$ _____
\$ _____	Child support <b>received</b> for all children. <b>Do not include foster care or adoption payments.</b>	\$ _____
\$ _____	Tax Exempt Interest income from IRS Form 1040-line 8b or 1040A-line 8b	\$ _____
\$ _____	Untaxed portions of pensions from IRS Form 1040-lines (15a minus line 15b) + (16a minus 16b) or 1040A-lines (11a minus 11b) + (12a minus 12b) excluding rollovers	\$ _____
\$ _____	<b>**NOTE**</b> Please enter the amount of above distribution that was rolled over: \$ _____ (Rollover Amount)	\$ _____
\$ _____	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)	\$ _____
\$ _____	Veterans' non education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances	\$ _____
\$ _____	Any other untaxed income not reported such as worker's compensation, disability, etc. Tax filers only: report combat pay not included in AGI. <b>Do not</b> include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay if you are not a tax filer, or benefits from flexible spending arrangements, (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels	\$ _____
\$ _____	Cash <b>received</b> , or any money paid on your behalf(e.g., bills), not reported elsewhere on this form	\$ <u>XXXXXXXXXX</u>

**Other**

\$ _____	Education credits (HOPE and Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31	\$ _____
\$ _____	Child support <b>you paid</b> because of divorce or separation. Do not include support for children listed in your (or your parents') household	\$ _____
\$ _____	Taxable earnings from Federal Work-Study or other need-based work programs	\$ _____
\$ _____	Student grant, scholarship, and fellowship aid, including AmeriCorps benefits (awards, living allowances, and interest accrual payments), that were reported to the IRS in your (or your parents') adjusted gross income.	\$ _____
\$ _____	Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income.	\$ _____
	<b>Do not</b> enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	

**Signatures**

I certify that all information provided on this form is true and correct to the best of my knowledge.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature (required if student is married)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature (or Step-Parent's)

\_\_\_\_\_  
Date

**Mail this completed worksheet and tax forms to the address on page 1. Make sure that tax forms are signed.**

# FOR OFFICE USE ONLY

	R	A	D
REFC _____			
Dependency Status	_____	_____	_____
Household Size	_____	_____	_____
Number in College (Exclude Parents)	_____	_____	_____
<b>STUDENT/SPOUSE:</b> (1040, 1040A, 1040EZ)			
Tax Return / Filing Status	_____	_____	_____
Student Work Income ( 7+12+18, 7, 1)	+ [ _____ ]	_____	_____
Spouse Work Income ( 7+12+18, 7, 1)	+ [ _____ ]	_____	_____
AGI (37, 21, 4)	OR + _____	OR + _____	_____
Income Tax Paid (56, 35, 11)	- _____	- _____	_____
<b>Untaxed Income:</b>	+ _____		
Pymts to tax deferred pension plans (W-2,Boxes 12a-12d, Codes D,E,F,G,H,S)		+ _____	_____
Child Support Received		+ _____	_____
IRA/Keogh Deductions (28+32, 17, -)		+ _____	_____
Untaxed Pensions (15a/16a-15b/16b, 11a/12a-11b/12b,-) Exclude Rollovers		+ _____	_____
Tax Exempt Interest Income (8b, 8b, -)		+ _____	_____
Other _____		+ _____	_____
<b>Other:</b>	- _____		
Education Credits (50, 31, -)		- _____	_____
Child Support Paid		- _____	_____
Taxable Earnings from Federal Work-Study Program		- _____	_____
Taxable Combat Pay		- _____	_____
Other _____		- _____	_____
<b>PARENTS:</b> (1040, 1040A, 1040EZ)			
Tax Return / Filing Status	_____	_____	_____
Father's Work Income ( 7+12+18, 7, 1)	+ [ _____ ]	_____	_____
Mother's Work Income ( 7+12+18, 7, 1)	+ [ _____ ]	_____	_____
AGI (37, 21, 4)	OR + _____	OR + _____	_____
Income Tax Paid (56, 35, 11)	- _____	- _____	_____
<b>Untaxed Income:</b>	+ _____		
Pymts to tax deferred pension plans (W-2,Boxes 12a-12d, Codes D,E,F,G,H,S)		+ _____	_____
Child Support Received		+ _____	_____
IRA/Keogh Deductions (28+32, 17, -)		+ _____	_____
Untaxed Pensions (15a/16a-15b/16b, 11a/12a-11b/12b,-) Exclude Rollovers		+ _____	_____
Tax Exempt Interest Income (8b, 8b, -)		+ _____	_____
Other _____		+ _____	_____
<b>Other:</b>	- _____		
Education Credits (50, 31, -)		- _____	_____
Child Support Paid		- _____	_____
Taxable Combat Pay		- _____	_____
Other _____		- _____	_____
<b>TOTAL:</b>	- _____	- _____	= _____
Verification Completed:			<b>Net Difference</b>
VEFC _____ Initial _____ Date _____			
306 _____ 325 _____			