

2011-2012 INDEPENDENT VERIFICATION WORKSHEET

Southern Wesleyan University
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Phone: 864-644-5500 Fax: 864-644-5970
www.swu.edu

Student's Last Name, First, M.I.

SWU ID # **OR** Last 4 digits Social Security Number

E-mail Address

Phone Number

WHY MUST I COMPLETE THIS WORKSHEET?

Your 2011-2012 financial aid application has been selected for a review process called "verification." Federal Law requires the applicant and his/her family to participate in the verification process, which is used to ensure the accuracy of the information reported on the student's Free Application for Federal Student Aid (FAFSA). When all information is received, it will be reviewed for accuracy, and conflicting or inconsistent information will be corrected. **Note: If you have applied for an extension for filing the 2010 Federal Tax Return, a copy of the approved extension must be submitted. However, no financial aid will be disbursed until all documents requested have been submitted.**

SECTION 1- Household Information

Please list below the people you (and your spouse) will support *between July 1, 2011 and June 30, 2012*.

Include:

- **Yourself**, your spouse, **and dependent children** (including stepchildren).
- Other people ONLY if they live with you and receive more than half their support from you now AND will continue to receive this support through June 30, 2012.
- The college/university attended by household members who will be pursuing a **degree** at least halftime (usually 6 hours/semester) in 2011-12.

Full Name of Family Member in Students' Household	Relationship to Student	Age	Name of College/University in 2011-12
1. You, the student	Self		Southern Wesleyan University
2.			
3.			
4.			
5.			
6.			
7.			

SECTION 2—Additional Financial Information

Please list all income and benefits that you and/or your spouse received in 2010. **DO NOT LEAVE ANY ITEM BLANK (USE ZEROS)**. Please note these worksheets do not ask for any income found on your tax return(s).

Per Question # 43 on FAFSA

Student (and Spouse)

- \$ _____ 2010 year child support you paid because of divorce or separation as a result of a legal requirement. Don't include support for children in your (or your spouses') household, as reported in question 93.
- \$ _____ Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.
- \$ _____ Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Combat pay is reported on the W-2 in Box 12, Code Q.
- \$ _____ **Student (and Spouse) Total**

Per Question # 44 on FAFSA

- \$ _____ Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), 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.
- \$ _____ 2010 year child support you received for all children. Don't include foster care or adoption payments.
- \$ _____ Housing, food and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits).
- \$ _____ Veteran's noneducation benefits, such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
- \$ _____ Other untaxed income or benefits not reported elsewhere, such as workers' compensation, disability, first-time home buyer, etc. Don't include student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.
- \$ _____ Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.
- \$ _____ If you did not, or were not required to, file a 2010 Federal tax return indicate the amount you earned from work.
- \$ _____ **Student (and Spouse) Total**

SECTION 3—Taxed Income Information

1. DID YOU (THE STUDENT) HAVE ANY INCOME IN 2010? YES* OR NO (CIRCLE ONE)

CHECK ONE BOX ONLY:

- CHECK AND ATTACH **SIGNED 2010** FEDERAL TAX RETURN.
- CHECK HERE IF YOU WILL NOT FILE AND ARE NOT REQUIRED TO FILE A TAX RETURN.

2. DID YOUR SPOUSE HAVE ANY INCOME IN 2010? YES* OR NO (CIRCLE ONE)

CHECK ONE BOX ONLY:

- CHECK AND ATTACH **SIGNED 2010** FEDERAL TAX RETURN.
- CHECK HERE IF YOU WILL NOT FILE AND ARE NOT REQUIRED TO FILE A TAX RETURN.

*Please submit a **SIGNED** photocopy of your **1040/1040A/1040EZ** or **Telefile** or if *not required* to file a tax return, submit a photocopy of your **W-2 form(s)**. (If you did not keep a copy of your tax return, call 1-800-829-1040 to request a tax summary.) Unsigned tax forms will be **returned** and your application will be put on hold.

NOTE: U.S. Electronic Filing Form 8453 is **NOT** acceptable.

 *SECTION 4—Student Certification*

WE CERTIFY ALL INFORMATION ON THIS FORM IS COMPLETE AND CORRECT.

Student (REQUIRED) _____ Date _____

Spouse (Optional) _____ Date _____

 Please review the information you have provided for accuracy. This could save valuable time.

DID YOU REMEMBER TO.....

- Provide a SIGNED copy of all 2010 Federal Tax Returns. NOTE: U.S. Electronic Filing Form 8453 is NOT acceptable.
- Submit a copy of all W-2 forms.
- Proof read this entire worksheet for accuracy. If pertinent information is left blank, this form will be returned and may affect your student financial aid eligibility.
- Contact your Financial Aid Counselor if you were unsure about how to answer any section.

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

Questions? Please contact your Financial Aid Counselor for assistance at:

Last Name A-K

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