# 2015-2016 Independent Student Verification Worksheet

To complete the processing of your financial aid for the 2015–2016 academic year, we need to verify the information you provided on the Free Application for Federal Student Aid (FAFSA). Please provide us with additional information about you and your spouse by completing all parts of this worksheet. Indicate $0 or N/A if items do not apply. **Sign the Certification Statement on the final page before submitting the worksheet.**

## 2015–2016 Independent Household Verification

**Directions:** List the number of people whom you or your spouse will support between July 1, 2015, and June 30, 2016. **Include yourself (and your spouse).** Include your or your spouse’s children if the children get more than half of their support from you or your spouse. Include other people only if they now live with and get **more than half their support from you or your spouse,** and will continue to get this support between July 1, 2015, and June 30, 2016. If there are more than six people, please attach a sheet listing additional family members.

(Support includes: money, gifts, loans, housing, food, clothes, car, medical and dental, payment of college costs, etc.)

<table>
<thead>
<tr>
<th>Full Name of Family Member</th>
<th>Age</th>
<th>Relationship To You</th>
<th>Attending undergraduate college at least half-time during 2015–2016?</th>
<th>Degree Program (for example: M.D., B.A.)</th>
<th>Name of College or University family member will attend in 2015–2016?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example</td>
<td>18</td>
<td>You—the student</td>
<td>Yes</td>
<td>M.D.</td>
<td>Loyola University Chicago</td>
</tr>
<tr>
<td>Example</td>
<td>53</td>
<td>Parent</td>
<td>No</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

1. 

2. 

3. 

4. 

5. 

6. 

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**IV HSD 2016**

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Last updated 03/03/15
Directions: The FAFSA asked for other income items, which were not included in the Adjusted Gross Income on your federal income tax return. The following list includes some of those items. Please complete the items below as of the date you signed the FAFSA. Enter all of the following information that applies to you or your spouse. List the total (annual) amount received in 2014. Indicate $0 if an item does not apply. Attach supporting documentation as appropriate.

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 Box 12a through 12d, codes D, E, F, G, H and S. $ ______________

IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS 1040-line 28 & line 32 or 1040A-line 17. $ ______________

Child support actually received for all children during 2014. Note: Don’t include foster care or adoption payments. $ ______________

- Check if benefits ended during 2014.
- Check if benefits will end during 2015.

What is the end date and total amount for 2015? ______________ $ ______________

Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b $ ______________

Untaxed portions of IRA distributions from IRS Form 1040-lines (15a minus 15b) or 1040A-lines (11a minus 11b). If this is a rollover include form 1099-R, a copy of your 2014 Federal Tax Transcript, and a written statement regarding the transaction. $ ______________

Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A (12a minus 12b). If this is a rollover include form 1099-R, a copy of your 2014 Federal Tax Transcript, and a written statement regarding the transaction. $ ______________

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 non education benefits (Disability, Death Pension, DIC and/or VA Educational Work-Study) $ ______________

Worker’s Compensation $ ______________

- Check if benefits ended during 2014.

2015-2016 Real Estate/Investment Verification

Directions: Please complete the following inquiry regarding your or your spouse’s their real estate/investment(s). DO NOT INCLUDE THEIR HOME OR PRIMARY RESIDENCE, but do include rental portions (if the residence is a duplex, two-flat or apartment building).

Concerning: Please give the full address of the property:*

________________________________________ Unit # (if applicable) ____________

What was the total value of the investment as of the date the FAFSA was signed? $ ______________

What was the total debt owed on the investment as of the date the FAFSA was signed? $ ______________

Do you own the property solely or are they in partnership owning only a percentage? If a partnership, what percentage of the property is owned by your parents? %

If you have reported the total debt greater than the total value, explain why and attach supporting documentation. *Please attach additional sheets for additional properties.
**2015–2016 Asset Verification**

**Directions:** Please indicate the value of cash, savings, checking accounts and investments – not including your home 401(k) or 403(b) value - as of the date you signed the FAFSA.

**Student/Spouse Assets**
- Cash, savings and checking accounts
  - $__________
- Other investments (Include stocks, bonds, CDs, trust funds)
  - $__________

**Business Income**
As of today, what is the net worth of your Parent’s current business and/or investment farms?
- $__________
Do not include a family farm or family business with 100 or few full-time or full-time equivalent employees.

If you had a change in the value of your assets within the last year, please explain below. Be sure to address any circumstances in which the value of the asset (which paid interest or dividends reported on the 2013 federal tax return) has been reduced.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

**2015–2016 Income Exclusion Verification**

**Directions:** Please complete the information below, applicable from January 1 to December 31, 2014. Indicate $0 or N/A if an item does not apply.

- **Education credits** (Hope and Lifetime Learning Tax Credits) from IRS Form 1040-line 49; or 1040A-line 31.
  - $__________
- **Child support** actually paid to the other parent in 2014 because of divorce or separation.
  - Do not include support for children in your household.
  - $__________
- Taxable earnings from Federal Work-Study or other need-based work programs
  - $__________
- AmeriCorps awards – allowances and benefits
  - $__________

**Certification Statement:**
All of the information provided by me or any other person on this form is accurate and complete to the best of my knowledge. If requested, we agree to give proof of the information we have provided on this form. Proof may include court documents, canceled checks, etc. Failure to provide the requested information will result in the loss of financial aid eligibility.

________________________________________________________________________
________________________________________________________________________

Student Signature

Date

Spouse’s Signature

Date

The U.S. Department of Education no longer allows a preparer’s copy of tax returns to satisfy the Verification requirement. You may order a [TAX RETURN TRANSCRIPT](http://www.irs.gov) from the Internal Revenue Service online at [www.irs.gov](http://www.irs.gov) or by phone at 1-800-908-9946. Obtain a [2014 Federal IRS Tax Return Transcript and W-2 forms](http://www.irs.gov) for yourself, your spouse (if married) or your parents/step-parent (if dependent). Note: If you used the IRS Data Retrieval tool to transfer your IRS income data to your FAFSA, you may not have to submit the IRS Tax Transcript.