



UTC Financial Aid Office
2009-2010 VERIFICATION WORKSHEET
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Your Free Application for Federal Student Aid (FAFSA) was selected for review by the U.S. Department of Education in a process called "Verification". This means UTC must compare the information from your FAFSA with your 2008 Federal tax forms and this worksheet. If there are differences between your application information and your financial documents, corrections will be reprocessed electronically based on the documentation submitted. **Any correction may cause changes to your award amount(s).**

Please submit the following:

1) this worksheet

2) copies of the student's and/or spouse's, parent's and/or step-parent's 2008 Federal IRS 1040, 1040A, or 1040EZ forms.

If you do not have a copy of your 2008 tax returns you may contact the **IRS at 1-800-829-1040** and request a **tax return transcript**.

All documents must be signed.

The Financial Aid office reserves the right to request additional documents, if needed, to confirm the data submitted on your FAFSA. UTC is required to request and review this information under federal regulations 34 CFR, Part 668.

All information should be sent to: **UTC Financial Aid Department 4805, 615 McCallie Avenue, Chattanooga, TN 37403-2598** or by

FAX 423 425-2292. You should complete verification as soon as possible so that your financial aid will not be delayed. If you need help, you may visit our office in Hooper Hall, Room 101, contact us at 423 425-4677, or via our website <http://www.utc.edu/FinancialAid>.

Incomplete and/or improperly signed forms will delay completion of file and awarding.

A. DEPENDENCY STATUS

The following questions are used to determine your dependency status. If you answer "**Yes**" to any of these questions, you are an **Independent** student for federal financial aid purposes. If you answer "**No**" to all of these questions, you are a **Dependent** student for federal financial aid purposes.

Were you born before January 1, 1986?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Will you be working on a master's or doctorate degree during 2009-2010?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Were you married the date you signed the FAFSA?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Do you have children who will receive more than half of their support from you between July 1, 2009 and June 30, 2010?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Are you a veteran of the U.S. Armed Forces?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
At any time on or after July 1, 2008, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
At any time on or after July 1, 2008 did the director of an emergency shelter program funded by the U.S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
At any time on or after July 1, 2008, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Are you or were you an emancipated minor as determined by a court in your state of legal residence?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Are you or were you in legal guardianship immediately before you reached the age of being an adult as determined by a court in your state of legal resident?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Do you have dependents, other than your children or spouse, who live with you and receive more than half of their support from you, now and through June 30, 2010?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
When you were age 13 or older, were both of your parents deceased, were you in foster care, or were you a dependent/ward of the court?	<input type="checkbox"/> YES	<input type="checkbox"/> NO

B. HOUSEHOLD INFORMATION

On your Free Application for Federal Student Aid, you identified the number of family members in your household and the number in college. We now need to learn more about those members of your household. **Please list each member, providing all requested information as applicable.**

Attach an additional sheet if necessary. **Do not forget that if you are a DEPENDENT student, you should report your PARENTS' household information.**

FULL NAME	AGE	RELATIONSHIP TO STUDENT	NAME OF COLLEGE ATTENDING (at least 6 hours) in 2009-2010
<i>Missy Jones (example)</i>	<i>18</i>	<i>Sister</i>	<i>Central University</i>
STUDENT		SELF	UTC

C. STUDENT/SPOUSE TAX FORM AND INCOME/BENEFIT INFORMATION

1. Check One for Student: _____ Required to file a 2008 U.S. Income Tax Return. Attaching or will submit **signed** copy to UTC.
 _____ Has not, will not, and is not required to file a 2008 U.S. Income Tax Return.
2. Check One for Spouse: _____ **No Spouse/Not Married**
 _____ Required to file a 2008 U.S. Income Tax Return. Attaching or will submit **signed** copy to UTC.
 _____ Has not, will not, and is not required to file a 2008 U.S. Income Tax Return.

3. List below student/ spouse employer or source of any income received in 2008. If you earned or received nothing, write "NONE."

EMPLOYER/SOURCE OF INCOME	TOTAL AMOUNT RECEIVED in 2008
	\$
	\$

D. PARENT TAX FORM AND INCOME/BENEFIT INFORMATION (IF STUDENT IS DEPENDENT)

1. Check one for Parent: _____ Required to file a 2008 U.S. Income Tax Return. Attaching or will submit **signed** copy to UTC.
 _____ Has not, will not, and is not required to file a 2008 U.S. Income Tax Return.
2. Check one for Step-Parent: _____ **No Step-Parent/Not married**
 _____ Required to file a 2008 U.S. Income Tax Return. Attaching or will submit **signed** copy to UTC.
 _____ Has not, will not, and is not required to file a 2008 U.S. Income Tax Return.

3. List below parent/step-parent employer or source of any income received in 2008. If you earned or received nothing, write "NONE."

EMPLOYER/SOURCE OF INCOME	TOTAL AMOUNT RECEIVED in 2008

E. UNTAXED INCOME RECEIVED and INCOME EXCLUSIONS from 2008

Student/spouse/parents: Please list any **untaxed** income received in 2008. Report the **total** amount received for January – December 2008

Be sure to enter zeros in **each** blank if no funds were received.

Student/Spouse	Calendar Year 2008	Parent(s)
\$	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 Forms in Boxes 12a through 12d, codes D, E, F, G, H, and S	\$
\$	Child support you/spouse or parent/step-parent received for all children. Don't include foster care or adoption payments. List children's name(s): _____, _____, _____	\$
\$	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 and Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances	\$
\$	Any other untaxed income not reported, such as workers' compensation, disability, etc. Don't include: student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), Workforce Investment Act educational benefits, foreign income exclusion or credit for federal tax on special fuels.	\$
\$	Money or gifts you received, or was paid on your behalf (e.g., bills), not reported elsewhere on this form	XXXXXXXXXX
\$	Child support you/spouse or parent/step-parent paid in 2008 because of divorce or separation or as a result of a legal requirement. Don't include here support paid for children in your/parents household List children's name(s) : _____, _____, _____	\$
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships included on 2008 tax return.	\$
\$	Student grant and scholarship aid included in your adjusted gross income on your 2008 tax return. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), and grant and scholarship 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 on your 2008 tax return. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	

F. READ STATEMENT CAREFULLY AND SIGN

By signing this form, I certify that all information is complete and correct.

Student Signature _____ Date _____ Parent Signature (if dependent) _____ Date _____

Student's phone# _____ Parent's daytime phone# _____