

STUDENT FINANCIAL ASSISTANCE

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Preparing people to lead extraordinary lives

2009-2010 INDEPENDENT STUDENT VERIFICATION WORKSHEET

Student Name: _____
 (Please Print)

Loyola ID: _____
 (Your 11-digit Loyola ID number begins 0000.)

To complete the processing of your financial aid for the 2009–2010 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.**

2009–2010 Independent Household Verification

Directions: List the number of people whom you or your spouse will support between July 1, 2009, and June 30, 2010. **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, 2009, and June 30, 2010. If there are more than ten 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.)

Full Name of Family Member	Age	Relationship Code (see codes below)	Attending college at least half-time during 2009–2010?	Degree Program (for example: B.S., M.S., PhD.)	Name of College or University family member will attend in 2009–2010?
1.		You – the student	Yes	B.S.	Loyola University Chicago
2.		4 – Spouse			
3.					
4.					
5.					
6.					
7.					
8.					

Relationship Codes:

- | | |
|--|--|
| 1 = Student’s parent | 5 = Student’s son or daughter |
| 2 = Student’s stepparent | 6 = Student’s grandparent |
| 3 = Student’s brother/stepbrother or sister/sistersister | 7 = Other (<i>explanation must be supplied on separate page</i>) |
| 4 = Student’s husband or wife | |



DTFA_IV

IV 2010



AY2010

2009–2010 Untaxed Income Verification

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 2008.** 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 2008. \$ _____
Note: Don't include foster care or adoption payments.

Check if benefits ended during 2008.

Check if benefits will end during 2009.

What is the end date and total amount for 2009? _____ \$ _____

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). Exclude rollovers. \$ _____

Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A (12a minus 12b). Exclude rollovers. \$ _____

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 2008.

2009-2010 Partnership / S Corporation Investment Verification

Directions: If line 17 of your or your spouse's 2008 1040 federal tax form indicates income (or loss) from a partnership or S corporation, please complete the following (attach additional sheets, if necessary):

Concerning (Business name): _____ **Type of Business:** _____

What was the **percentage of ownership** as of the date the FAFSA was filed? _____ %

How **many full-time or full-time equivalent employees** are retained by the business? _____

What was the **total value** of this business as of the date the FAFSA was filed?
Please include the value of the land, buildings, equipment and inventory. \$ _____

What was the **total debt** of the business as of the date the FAFSA was filed?
Include only the present mortgage and debts in which the business is used as collateral. \$ _____

2009-2010 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.**

2009-2010 Business Value Verification

Directions: If line 12 of your or your spouse's 2008 1040 federal tax form indicates a business income (or loss), please complete the following (attach additional sheets, if necessary):

Concerning (Business name): _____ **Type of Business:** _____

What was the **percentage of ownership** as of the date the FAFSA was filed? _____ %

How **many full-time or full-time equivalent employees** are retained by the business? _____

What was the **total value** of this business as of the date the FAFSA was filed?
Please include the value of the land, buildings, equipment and inventory. \$ _____

What was the **total debt** of the business as of the date the FAFSA was filed?
Include only the present mortgage and debts in which the business is used as collateral. \$ _____

2009–2010 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 Assets Cash, savings and checking accounts \$ _____

Other investments (Include stocks, bonds, CDs, trust funds) \$ _____

Spouse Assets

Cash, savings and checking accounts \$ _____

Other investments (Include stocks, bonds, CDs, trust funds) \$ _____

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 2008 federal tax return) has been reduced.

2009–2010 Income Exclusion Verification

Directions: Please complete the information below, applicable from January 1 to December 31, 2008. Indicate \$0 or N/A if an item does not apply.

Education credits (Hope and Lifetime Learning Tax Credits) from IRS Form 1040-line 50; or 1040A-line 31. \$ _____

Child support actually **paid** to the other parent in 2008 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's Signature

Date

Spouse's Signature

Date

PLEASE REMEMBER TO SUBMIT COPIES OF 2008 FEDERAL TAX FORMS, INCLUDING ALL SCHEDULES AND W-2 FORMS.