

**Federal Student Aid Programs**

**DEPENDENT**

Your application was selected for review in a process called Verification/Quality Assurance. In this process, Capital University must compare information from your application with signed copies of your and your parent(s)' 2008 federal tax forms. The law says we have the right and responsibility to require this information before awarding Federal aid. If there are differences between your application and your other documents, corrections may need to be submitted. Complete **ALL** information and return this form, along with copies of tax forms and W-2(s) to Capital University.

**A. Student Information** (Please correct any information listed and add missing information)

Student Name \_\_\_\_\_  
 Student Address \_\_\_\_\_  
 Student Social Security Number \_\_\_\_\_

**B. Family Information**

**COMPLETE THE TABLE BELOW.** List *BY NAME* the people who will live in your parent's household. **Include:**

- yourself;
- your parent(s) with whom you live (or last lived with) -include stepparent;
- your parents' other children if your parents provide **more** than half of their support from July 1, 2009 through June 30, 2010; and
- any other people who now live with your parents and will continue to live with your parents, **and** your parents provide more than half of their support and will continue to provide **more** than half of their support from July 1, 2009, through June 30, 2010.

Indicate if any will be enrolled in a degree or certificate program at a college, university or other post-secondary institution at least half-time between July 1, 2009 and June 30, 2010.

| Full Name | Age | Relationship | College            |
|-----------|-----|--------------|--------------------|
|           |     | Self         | CAPITAL UNIVERSITY |
|           |     |              |                    |
|           |     |              |                    |
|           |     |              |                    |
|           |     |              |                    |
|           |     |              |                    |

*(Attach a separate sheet if you need more room.)*

**C. Tax Forms and Income Information**

All tax filers must send Capital University a signed copy of all 2008 Federal Income Tax returns (include the 2008 IRS Form 1040 with all Schedules, 1040A, 1040EZ) for anyone whose information appears on the FAFSA. Please include all W-2(s). Check for whom you are enclosing tax forms:

- You                       Your father (step)                       Your mother (step)

Check the box for those people who are **NOT** required to file a 2008 Federal Income Tax Return.

- You                       Your father (step)                       Your mother (step)

NAME:

ID #:

| Student's<br>Yearly Amount | <u><b>DEPENDENT</b></u>  | Parent(s)<br>Yearly Amount |
|----------------------------|--|----------------------------|
|                            |  |                            |
| Student's<br>Yearly Amount | <b>Worksheet B<br/>Calendar year 2008</b>  | Parent(s)<br>Yearly Amount |
| \$                         | Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including amounts reported on <b>the W-2 Form in Boxes 12a-12d, codes D, E, F, G, H and S</b>  | \$                         |
| \$                         | Untaxed portions of 401(k) or 403 (b) plans, including <b>PERS, SERS, and /or STRS</b>   | \$                         |
| \$                         | IRA deductions and payments to self-employed SEP, SIMPLE and Keogh and other qualified plans from <b>IRS Form 1040 – total of lines 28+32 or 1040A – line 17</b>   | \$                         |
| \$                         | Child support <b>received</b> for all children. Don't include foster care or adoption payments   | \$                         |
| \$                         | Tax exempt interest income from <b>IRS Form 1040 – line 8b or 1040A - line 8b</b>  | \$                         |
| \$                         | Foreign income exclusion from <b>IRS Form 2555 – line 45 or 2555EZ - line 18</b>   | \$                         |
| \$                         | Untaxed portions of pensions/IRA distributions from <b>IRS Form 1040 – lines (15a minus 15b)+ (16a minus 16b) or 1040A – lines (11a minus 11b) + (12a minus 12b)</b> excluding rollovers   | \$                         |
| \$                         | Credit for federal tax on special fuels from <b>IRS Form 4136 – line 17</b> – nonfarmers only  | \$                         |
| \$                         | Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)  | \$                         |
| \$                         | Veterans noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work/Study allowances   | \$                         |
| \$                         | Any other untaxed income or benefits not reported elsewhere on Worksheets A and B, such as worker's compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, Refugee Assistance, etc.<br><b>Don't include</b> student aid, Workforce Investment Act educational benefits, or benefits from flexible spending arrangements, e.g. cafeteria plans. | \$                         |
| \$                         | Cash <b>received</b> , or any money paid on your behalf, not reported elsewhere on this form   | <b>Xxxxxx</b>              |
| \$                         | <b>TOTAL B</b>   | <b>TOTAL B</b><br>\$       |
|                            |  |                            |
| Student's<br>Yearly amount | <b>Worksheet C<br/>Calendar year 2008</b>  | Parent(s)<br>Yearly Amount |
|                            |  |                            |
| \$                         | Education credits (Hope and Lifetime Learning tax credits) from <b>IRS Form 1040 – line 50 or 1040A – line 31</b>  | \$                         |
| \$                         | Child support <b>paid</b> because of divorce or separation. <b>Provide a copy of your 2008 Child Support Enforcement Agency document.</b>  | \$                         |
| \$                         | Taxable earnings from Federal Work Study or other need-based work programs.  | \$                         |
| \$                         | Student grant, scholarship, and fellowship aid, including AmeriCorps awards, that was reported to the IRS in your (or your parents') adjusted gross income   | \$                         |
| \$                         | <b>TOTAL C</b>   | <b>TOTAL C</b><br>\$       |

### **E. Sign this Worksheet and return it along with tax forms and W-2(s) to:**

**Capital University, Financial Aid Office, 1 College and Main, Columbus, Ohio 43209**

By signing this worksheet, we certify that all the information reported on this worksheet is complete and correct. At least one parent must sign. **Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

Date \_\_\_\_\_

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

Parent's Signature \_\_\_\_\_