

Your application was selected for review in a process called “verification”. In this process, we will be comparing information from your application with signed copies of your (and your spouse’s if you are married) 2011 Federal tax transcripts, W-2 Forms, and other financial documents. The law says we have the right to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, we may send corrections electronically to have your information reprocessed. Sign all forms.

**What you should do**

1. Please file your (and your spouse's) 2011 Federal tax return as soon as possible. We are unable to confirm your financial aid eligibility until all verification requirements are met.
2. Once the tax return has been processed, please return to your FAFSA and authorize the IRS Data Retrieval or obtain an official IRS transcript to complete the verification process. The IRS Federal tax transcript must be signed by the filer(s) and the W-2(s) must be attached.
3. Call Troy University at 1-800-414-5756, if you have any questions.

Complete this verification form and submit it to:

Troy University  
 Financial Aid Office  
 134 Adams Admin. Bldg.  
 Troy, AL 36082

**A. Student Information**

\_\_\_\_\_  
 Last name                      First name                      MI

\_\_\_\_\_  
 Social Security Number

\_\_\_\_\_  
 Address (include apt. no.)

\_\_\_\_\_  
 Date of Birth

\_\_\_\_\_  
 City                              State                              Zip code

\_\_\_\_\_  
 Phone number (include area code)                      Email address

**B. Family Information**

List the people in your household, including:

- ◆ Yourself and your spouse if married, and
- ◆ Your children if you provide more than half of their support from July 1, 2012 through June 30, 2013, or if the child would be required to provide your information if they were completing a FAFSA for 2012-2013. Include children who meet either of these standards, even if they do not live with you.
- ◆ Any other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2012 through June 30, 2013.

Write the names of all household members. Also write in the name of the college for any household member who will be attending college at least half time between July 1, 2012 and June 30, 2013, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
You, the student			Troy University

**C. Independent Student's Income Information to Be Verified**

**1. TAX RETURN FILERS—**

**Instructions:** Complete this section if you, the student, filed or will file a 2011 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If you have not already used the tool, go to [FAFSA.gov](http://FAFSA.gov), log in to your FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2011 IRS income tax information into your FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid office.*

**Check the box that applies:**

- I, the student, have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer my (and, if married, my spouse's) 2011 IRS income information into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *Vj g'kpcpeknc'kf "qllteg will use the IRS information that was transferred in the verification process.*
- I, the student, have not yet used the IRS Data Retrieval Tool, but I will use the tool to transfer my (and, if married, my spouse's) 2011 IRS income information into my FAFSA once I have filed my 2011 IRS tax return. *See instructions above for information on how to use the IRS Data Retrieval Tool. Vj g'kpcpeknc'kf "qllteg cannot complete the verification process wvkl' qwt (and, if married, your spouse's) IRS information has been transferred into your FAFSA.*
- I, the student, am unable or choose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and I will submit to the school a signed **2011 IRS tax return transcript(s)**—not photocopies of the income tax return. *To obtain an IRS tax return transcript, go to [www.irs.gov](http://www.irs.gov) and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when your 2011 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you are married and you and your spouse filed separate 2011 tax returns, you must submit tax return transcripts for both you and your spouse.*
- Check here if a signed IRS tax return transcript(s) is attached to this worksheet.*
- Check here if a signed IRS tax return transcript(s) will be submitted to your school later. Verification cannot be completed until the signed IRS tax return transcript(s) has been submitted to vj g'kpcpeknc'kf "qllteg.*

**2. TAX RETURN NONFILERS—**Complete this section if you, the student (and, if married, your spouse), will not file and are not required to file a 2011 income tax return with the IRS. You must complete a 2012-2013 Living Expense Statement form. It can be located at [www.troy.edu/financialaid](http://www.troy.edu/financialaid) under **2012-2013 Forms**.

**Check the box that applies:**

- The student (and, if married, the student's spouse) was not employed and had no income earned from work in 2011.
- The student (and/or the student's spouse if married) was employed in 2011 and has listed below the names of all employers, the amount earned from each employer in 2011, and whether an IRS W-2 form is attached. Attach copies of all 2011 W-2 forms issued to you (and, if married, to your spouse) by employers. *List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, attach a separate page with your name and SSN at the top.*

Employer's Name	2011 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>

Student's Name \_\_\_\_\_ SSN: \_\_\_\_\_

1. Please complete all the fields below. If any field is left blank, we will consider the form incomplete, we will **NOT** assume 0.

Calendar Year 2011		
2012-2013 INDEPENDENT FAFSA WORKSHEET		
STUDENT		SPOUSE, if married
2011 Additional Financial Information		
\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31	\$
\$	Child support paid because of divorce or separation or as a result of a legal requirement . Don't include support from children you claimed in household size.	\$
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
\$	Student grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	\$
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$
\$	Cooperative education program earnings.	\$

Calendar Year 2011		
2012-2013 INDEPENDENT FAFSA WORKSHEET		
STUDENT		SPOUSE, if married
2011 Untaxed Income		
\$	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.	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040-total of lines 28+32 or 1040A-line 17.	\$
\$	Child support received for all children. Don't include foster care or adoption fees.	\$
\$	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. If negative, enter a zero here.	\$
\$	Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A-lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	\$
\$	Housing, food, and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits) Don't include the value of on-base military housing or the value of a basic military allowance for housing.	\$
\$	Veterans' non-education benefits such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study Allowances.	\$
\$	Other untaxed income not reported, such as workers' compensation, disability, etc. Also include first time homebuyer tax credit from IRS form 1040-line 67. Don't include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, SSL, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending plans(e.g. cafeteria plan), foreign income exclusion or credit for fed tax on special fuels	\$
\$	Money received, or paid on your behalf (e.g. bills) not reported elsewhere on form.	\$

Student's Name: \_\_\_\_\_ SSN: \_\_\_\_\_

**D. Independent Student's Other Information to Be Verified**

1. Complete this section if someone in the student's household (listed in Section B) received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2010 or 2011 calendar years.

One of the persons listed in Section B of this worksheet received SNAP benefits in 2010 or 2011. Documentation of the receipt of SNAP benefits during 2010 and/or 2011 must be attached.

2. Complete this section if you or your spouse, if married, paid child support in 2011.

Either I, or if married my spouse who is listed in Section B of this worksheet, paid child support in 2011. I have indicated below the name of the person who paid the child support, the name of the person to whom the child support was paid, the names of the children for whom child support was paid, and the total annual amount of child support that was paid in 2011 for each child. If asked by my school, I will provide documentation of the payment of child support. *If you need more space, attach a separate page that includes your name and Social Security Number at the top.*

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Amount of Child Support Paid in 2011
<i>Marty Jones(example)</i>	<i>Chris Smith</i>	<i>Terry Jones</i>	<i>\$6,000.00</i>

**E. Certification and Signature**

I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet. If married, the spouse's signature is optional.

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

**Please check each box and sign and date at the bottom of the form to affirm that you acknowledge and understand that:**

You must complete the FAFSA IRS Data Retrieval or submit a copy of your signed 2011 Federal tax return transcript and W-2(s) when you filed Federal Taxes for verification to be considered complete. **We will no longer be allowed to accept copies of the Federal tax return.**

Adjustments to your financial aid eligibility may be required due to the results of this verification process, which may change the sources and amounts of your Financial Aid Award offer.

If you file or later file an amended 1040X tax form, you agree to notify Troy University's Financial Aid Office and submit a signed copy of the tax account transcript, which can be ordered from the IRS, to supplement your current verification materials.

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature (Optional)

\_\_\_\_\_  
Date