



# Financial Aid & Scholarships Office

## 2008-2009 Verification Form and Worksheets

Your application was selected for review in a process called "Verification". In this process, the University of Missouri – Kansas City (UMKC) Financial Aid and Scholarships Office will be comparing information from your application with signed copies of your (and, if you are married, your spouse's) 2007 Federal Income Tax return(s), W-2 forms, and/or other financial documents. The law states that we have the right to ask you for this information before awarding/dispersing federal aid. If there are differences between your application information and your financial documents, corrections may need to be made to your 2008-2009 Student Aid Report (SAR). The UMKC Financial Aid and Scholarships Office will correct your information electronically if required.

### What You Should Do:

1. Collect your (and your spouse's, if married) **signed** 2007 financial documents: **Federal 1040, 1040A, or 1040EZ income tax returns, W-2 forms, etc.**
2. Fill in and sign the Verification Form and Worksheet. If married, spouse's signature is optional.
3. Take the completed Verification Form, tax return(s), and any other documents and return them to the UMKC Financial Aid and Scholarships Office.

STUDENT NAME: \_\_\_\_\_ SSN: \_\_\_\_\_

STUDENT ID#: \_\_\_\_\_ PHONE NUMBER: \_\_\_\_\_

CURRENT ADDRESS: \_\_\_\_\_

### Student's Household Information:

List yourself, your spouse, if you have one, and your children if you will provide more than half of their support from July 1, 2008 through June 30, 2009. List any other people who 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, 2008 through June 30, 2009.

Write the names of all qualifying household members. Also write the name of the college for any household member who will be attending college at least half-time between July 1, 2008 and June 30, 2009 and will be enrolled in a degree, diploma or certificate program. If you need additional space, attach a separate page.

| Full Name | Age | Relationship | College |
|-----------|-----|--------------|---------|
|           |     | Student      | UMKC    |
|           |     |              |         |
|           |     |              |         |
|           |     |              |         |
|           |     |              |         |
|           |     |              |         |

|  |  |   |
|--|--|---|
| 5100 Rockhill Road 101 AC<br>Kansas City, MO 64110-2499  | Phone: 816-235-1154<br>Fax: 816-235-5511 | E-Mail: <a href="mailto:finaid@umkc.edu">finaid@umkc.edu</a><br>Toll Free: 1-800-775-UMKC |
| Those with speech or hearing impairments may use Relay Missouri, 1-800-735-2966 (TT) or 1-800-735-2466 (Voice) |  |   |

## A. Student's 2007 Federal Tax Forms and Income Information

- Tax Returns include the 2007 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of the tax return, request a copy from the Internal Revenue Service by calling 1-800-829-1040, or a copy from your tax preparer. IRS Form 8453 is not acceptable for verification purposes. **Check one box only.**
  - Check here if you have already submitted a copy of your 2007 U.S. Federal Income Tax return/Tax listing to UMKC and then complete items 2, 3 and 4.
  - Check and attach a signed copy of your 2007 U.S. Federal Income Tax Return/Tax Listing and complete items 2, 3 and 4.
  - Check if you will not file and are not required to file a 2007 U.S. Federal Income Tax return. If you check this box please be sure to complete items 2, 3, 4 and 5 below.

2. Follow the instructions on Worksheet A (on the opposite page). Enter the total for student from Worksheet A. \$ \_\_\_\_\_  
If zero, enter '0'.

3. Follow the instructions on Worksheet B (on the opposite page). Enter the total for student from Worksheet B. \$ \_\_\_\_\_  
If zero, enter '0'.

4. Follow the instructions on Worksheet C (on the opposite page). Enter the total for student from Worksheet C. \$ \_\_\_\_\_  
If zero, enter '0'.

5. **If you did not file and are not required to file a 2007 Federal Income Tax return, list below your employer(s) and any income received in 2007. If none, enter 'none'.**

| Sources (Use the W-2 form or other earnings statements.) | Amount |
|--|--------|
|  |        |
|  |        |
|  |        |

## B. Spouse's 2007 Tax Forms and Income Information (If student is married)

- Tax Returns include the 2007 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of the tax return, request a copy from the Internal Revenue Service by calling 1-800-829-1040, or from the tax preparer. IRS Form 8453 is not acceptable for verification purposes. **Check one box only.**
  - Check and attach a signed copy of spouse's 2007 U.S. Federal Income Tax Return/Tax Listing **ONLY IF A JOINT TAX RETURN WAS NOT FILED.** Complete items 2, 3 and 4.
  - Check if your spouse will not file and is not required to file a 2007 U.S. Federal Income Tax Return. If you check this box please be sure to complete items 2, 3, 4 and 5 below.

2. Follow the instructions on Worksheet A (on the opposite page). Enter the total for spouse from Worksheet A. \$ \_\_\_\_\_  
If zero, enter '0'.

3. Follow the instructions on Worksheet B (on the opposite page). Enter the total for spouse from Worksheet B. \$ \_\_\_\_\_  
If zero, enter '0'.

4. Follow the instructions on Worksheet C (on the opposite page). Enter the total for spouse from Worksheet C. \$ \_\_\_\_\_  
If zero, enter '0'.

5. **If your spouse did not file and is not required to file a 2007 Federal Income Tax return, list below your spouse's employer(s) and any income received in 2007. If none, enter 'none'.**

| Sources (Use the W-2 form or other earnings statements.) | Amount |
|--|--------|
|  |        |
|  |        |
|  |        |

## C. Sign and Date this Form

By signing this worksheet, I (we) certify that all the information reported to qualify for Federal student aid is complete and correct.  
**If married, spouse's signature is optional.**

Student \_\_\_\_\_

Date \_\_\_\_\_

Spouse \_\_\_\_\_

Date \_\_\_\_\_

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

**Do not mail this worksheet to the federal processor. Take it or mail it to the UMKC Financial Aid & Scholarships Office.**

FOR A2  
Student

# Worksheet A

Calendar Year 2007

FOR B2  
Spouse

|    |   |   |    |
|----|---|---|----|
| \$ | Earned income credit from IRS form 1040-line 66a; 1040A - line 40a; or 1040 EZ-line 8a  | \$  |    |
| \$ | Additional child tax credit from IRS Form 1040-line 68 or 1040A-line 41   | \$  |    |
| \$ | Welfare benefits, including Temporary assistance for Needy Families (TANF).<br>Don't include Food Stamps or subsidized housing.   | \$  |    |
| \$ | Social Security benefits (such as SSI) that were received but not taxed. Tax filers, see IRS form 1040-line 20a-20b or 1040A - line 14a-14b, and/or SSI Statement; non-filers, see SSI Statement. | \$  |    |
| \$ | ← <b>Enter in A2</b><br>on the opposite page (if zero, enter '0')   | <b>Enter in B2</b> →<br>on the opposite page (if zero, enter '0') | \$ |

FOR A3  
Student

# Worksheet B

Calendar Year 2007

FOR B3  
Spouse

|    |   |   |    |
|----|---|---|----|
| \$ | Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including amounts reported on 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 and 32 or 1040A-line 17  | \$  |    |
| \$ | Child support <b>received</b> for all children. Don't include foster care or adoption payments.   | \$  |    |
| \$ | Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b  | \$  |    |
| \$ | Foreign income exclusion from IRS Form 2555-line 45 or 2555EZ-line 18   | \$  |    |
| \$ | Untaxed portions of pensions from IRS Form 1040-lines (15a minus 15b) + (16a minus 16b) or 1040A-lines (11a minus 11b) + (12a minus 12b) excluding rollovers, if negative enter a zero here.  | \$  |    |
| \$ | Credit for federal tax on special fuels from IRS Form 4136-line 18 - 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>Enter in A3</b><br>on the opposite page (if zero, enter '0')   | <b>Enter in B3</b> →<br>on the opposite page (if zero, enter '0') | \$ |

FOR A4  
Student

# Worksheet C

Calendar Year 2007

FOR B4  
Spouse

|    |   |   |    |
|----|---|---|----|
| \$ | Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31  | \$  |    |
| \$ | Child support <b>paid</b> because of divorce or separation. Do not include support for children in your (or your spouse's) household, as reported above on Worksheet 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 spouse's) adjusted gross income              | \$  |    |
| \$ | ← <b>Enter in A4</b><br>on the opposite page (if zero, enter '0')   | <b>Enter in B4</b> →<br>on the opposite page (if zero, enter '0') | \$ |

5100 Rockhill Road 101 AC  
Kansas City, MO 64110-2499

Phone: 816-235-1154  
Fax: 816-235-5511

E-Mail: [finaid@umkc.edu](mailto:finaid@umkc.edu)  
Toll Free: 1-800-775-UMKC

Those with speech or hearing impairments may use Relay Missouri, 1-800-735-2966 (TT) or 1-800-735-2466 (Voice)

an equal opportunity/affirmative action institution