



Office of Financial Aid -- Dutchess Community College  
 Orcutt Student Services Center/ Room 104 -- (845) 431-8030/Fax (845) 431-8603  
 Email: [financial-aid@sunydutchess.edu](mailto:financial-aid@sunydutchess.edu)

**2010 – 2011 INDEPENDENT VERIFICATION WORKSHEET**

<b>Last Name</b>	<b>First Name</b>	<b>Student ID Number: A</b>
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**List the people in your household**, include:

- yourself, and your spouse if you have one, and
- your children, if you will provide more than half of their support from July 1, 2010 through June 30, 2011, and
- 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, 2010 through June 30, 2011.

**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, 2010 and June 30, 2011 and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page. (If attached, please check this box )**

Full Name	Age	Relationship	College 2010-2011
		SELF	

**Student’s Tax Forms and Income Information** ↔ Tax returns include the 2009 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return and all W-2s. If you did not keep a copy of the tax return or W-2s, request a copy from your tax preparer or a copy of an Internal Revenue Service form that lists tax transcript information (1-800-829-1040). **Check All Boxes That Apply:**

- Check and attach signed tax return & W-2s. **(Photocopies that the Office of Financial Aid may keep)**
- Check if you worked in 2009, but will not file and are not required to file a 2009 U.S. Income Tax Return. **(Please make photocopies of all W-2s the Office of Financial Aid may keep)**
- Check if you will not file and are not required to file a 2009 U.S. Income Tax Return.
- Check if you and your spouse did file separate tax returns. Attach tax returns for yourself & your spouse. **(Photocopies that the Office of Financial Aid may keep)**
- Check if you are filing an extension. Please be aware that until the DCC Office of Financial Aid receives your 2009 Tax Return & W-2s we will be unable to finish processing your financial aid file. .

If you or your spouse did not file and are not required to file a 2009 Federal income tax return, list below your and your spouse’s employer(s) and any taxable income received in 2009 (use the W-2 form or other earnings statements if available). **Please make photocopies of all W-2s the Office of Financial Aid may keep.**

Sources	2009 Amount
	\$
	\$
	\$

Please answer every question. If it does not apply, put "0"

INDEPENDENT

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### 2009 Untaxed Income \*Yearly Amounts\*

- \$ \_\_\_\_\_ **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 you **received in 2009** for all children. Do not include foster care or adoption payments.
- \$ \_\_\_\_\_ 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).
- \$ \_\_\_\_\_ 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, such as workers' compensation, disability, etc.. **Do not include** student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements, (e.g. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.
- \$ \_\_\_\_\_ Money **received** or paid on your behalf (e.g. bills), not reported elsewhere on this form.

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### 2009 Additional Financial Information

- \$ \_\_\_\_\_ Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31
- \$ \_\_\_\_\_ Child support you **paid** because of divorce or separation or as a result of a legal requirement in 2009. Don't include support for children in your household, as reported in question 96 (or question 75 for your parents)
- \$ \_\_\_\_\_ Taxable earnings from need based student employment such as, Federal Work-Study and need-based employment Portions of fellowships and assistantships.
- \$ \_\_\_\_\_ 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).

**WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, sent to prison or both. By signing this worksheet, I (we) certify that all the information reported on it is complete and correct.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date