



# 2009-2010 Independent Verification Worksheet

Complete & Mail back to:

Maine Maritime Academy  
Financial Aid Office  
66 Pleasant Street  
Castine, ME 04420  
(207) 326-2205



This form supplements the *Free Application for Federal Student Aid (FAFSA)*, which must be filed by all applicants. **No application is complete until this supplement, the FAFSA, federal tax return, and W2's are received in the Financial Aid Office.** Applying for financial aid has no bearing on an application for admission; however, financial aid **applicants must be accepted for admission prior to receiving a financial aid award.**

## A. STUDENT INFORMATION

Student Name:	Social Security #:
Address (Include apt. no.)	Date of Birth:
City, State, Zip Code:	Phone Number: (     )

List the people that you (and your spouse) will support between July 1, 2009 and June 30, 2010. Include:

- Yourself
- Your spouse
- Your dependent children (if you provide more than half their support)

Include other people as part of your family only if:

- They lived with you and received more than half their support from you (or your spouse) at the time you completed your FAFSA  
And
- They will continue to receive more than half their support from July 1, 2009 through June 30, 2010.

**Write the names of all family members that meet the qualifications listed above.** Also write in the name of the college for any family member who will be attending college at least half-time between July 1, 2009 and June 30, 2010, and will be enrolled in a degree or certificate program. If you need more space, attach another sheet.

## B. FAMILY INFORMATION

Full Name:	Age	Relationship	Name of College attending 2009-2010 school year	Year in College
<i>Example: Anthony Jones</i>	25	Self/Student	Maine Maritime Academy	1 <sup>st</sup> year
		Self / Student	Maine Maritime Academy	
		Spouse		
		Son/Daughter	N/A	N/A
		Son/Daughter	N/A	N/A

## C. CERTIFICATION BY SIGNATURE (If married, spouse's signature is optional)

By signing, we certify that all the information provided is complete and correct, and that we have attached an accurate, **SIGNED COPY** of any 2008 U.S. Income Tax Return requested on this form. If you did not keep a copy of your 2008 U.S. Income Tax Return, please request either: (1) a copy from your tax preparer; or (2) request an RTFTP printout or Letter 1722 from the IRS (800-829-1040). Tax filer is required to sign all income documentation submitted with this worksheet.

Student Signature	Date	Spouse Signature	Date
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Do not mail this worksheet to the FAFSA processor. Mail it to MMA Financial Aid Office. Don't forget to enclose your signed tax return.

**D. STUDENT'S TAX FORMS and INCOME INFORMATION****Independent****Did or will you (the student) file a Federal Income Tax Return for 2008?**     Yes     No1) If you checked  **YES**: Attach a clear, signed, readable copy of:

- Student's signed 2008 Federal tax return (state returns are not required); **AND**
- Student's W2's Wage Forms for the 2008 tax year (all).

If you did not keep a copy of your 2008 U.S. Income Tax Return, please request either: (1) a copy from your tax preparer; or (2) request an RTFTP printout or Letter 1722 from the IRS (800-829-1040).

2) If you checked  **NO**: You will need to complete a "STUDENT 2008 NON-TAX FILERS STATEMENT." If this form did not accompany this Verification Worksheet, please call MMA for a copy.**E. SPOUSE'S TAX FORMS and INCOME INFORMATION (If married)****Did or will your spouse file a Federal Income Tax Return for 2008?**     Yes     No1) If you checked  **YES**: Attach a clear, signed, readable copy of:

- Signed 2008 Federal tax return (state returns are not required); **AND**
- W2's Wage Forms for the 2008 tax year (all).

If you did not keep a copy of your 2008 U.S. Income Tax Return, please request either: (1) a copy from your tax preparer; or (2) request an RTFTP printout or Letter 1722 from the IRS (800-829-1040).

2) If you checked  **NO**: You will need to complete a "2008 NON-TAX FILERS STATEMENT." If this form did not accompany this Verification Worksheet, please call MMA for a copy.**F. TO BE COMPLETED BY ALL APPLICANTS**

<i>Enter amounts for the items below, which pertain to you (and your spouse). (If an item does not pertain to you, write "0" or "N/A")</i>	<i>2008 Amount (1/1/2008-12/31/2008)</i>	
	<i>Student</i>	<i>Spouse</i>
Payments to tax deferred pensions and savings plans, including amounts reported on the W2 Form in boxes 12a through 12d, codes D,E,F,G,H, and S. Include untaxed portions of 401(k) and 403(b) plans.	\$	\$
Child support <b>RECEIVED</b> for all children. Don't include foster care or adoption payments.	\$	\$
Social Security benefits received that were not taxed (include amounts received "for" children).	\$	\$
Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits).	\$	\$
Tax filers only; report combat pay not included in AGI.	\$	\$
Other untaxed income: (Specify: _____)	\$	\$
Child support <b>PAID</b> for all children.	\$	\$



# Instructions to Completing this 2009-2010 Financial Aid Verification Worksheet



## 1. What is Verification and Why was I Selected?

Verification is the process used to check the accuracy of the information provided by a student/family on the Free Application for Federal Student Aid (FAFSA). Selection for verification is determined by the information submitted on your FAFSA. This process, mandated by the U.S. Department of Education, requires selected applicants and all new incoming students to submit a verification form and copies of federal income tax returns, W2's and other documents to the Financial Aid office at Maine Maritime Academy.

Selection for verification does not mean that we think your information is incorrect. Some applications are selected randomly; while others are selected based on common edits that check FAFSA data for consistency and logic. The verification process can take some time to complete, so we encourage you to respond promptly and accurately to any requests for information from the MMA Financial Aid Office. **No determination of aid eligibility or disbursement of funds can be made until the verification process has been completed.**

## 2. What do I (Student) Need to Provide to MMA if I'm Selected?

Student **MUST** submit the following to complete verification:

- This attached Verification Worksheet.
- A signed copy of student's 2008 Federal Income Tax Return, **AND** W2's that are requested in Section D (state tax returns are not required).
- A signed copy of spouse's (if married) 2008 Federal Income Tax Return, **AND** W2's that are requested in Section E (state tax returns are not required).

## 3. What Happens once MMA receives my Information?

Once you submit your accurately completed Verification Worksheet and signed tax documents, the Financial Aid Office will compare the information on these documents to the information you provided on your 2009-2010 FAFSA. In some cases, the Financial Aid Office must submit the changes made to the U.S. Department of Education (FAFSA processor). You will then receive another Student Aid Report (SAR) from the FAFSA processor showing these changes.

Once your eligibility for financial aid has been determined, you will be mailed an award letter (goes to the address listed on the FAFSA). You can accept your award and return the award acceptance form and loan application (if applicable) back to Maine Maritime Academy for processing or deny the aid awarded. The award acceptance form must be returned back to Maine Maritime Academy either accepting or denying.

## 4. What Happens if I (Student) do not Provide MMA with the Requested Information?

When you and your spouse signed the Free Application for Federal Student Aid (either by signing a paper FAFSA or by using your PIN on the web) you agreed, if asked, "to provide information that will verify the accuracy of your completed form." **No determination of aid eligibility or disbursement of funds can be made until the verification process has been completed.**

## **5. Suggestions for Copying/Submitting Federal Income Tax Documents**

In all cases, a signed photocopy of the original Federal tax return that was filed with the IRS is acceptable (we do not need state tax returns). **Please include copies of all W2's.** Failure to submit complete information will cause delays in the determination of your aid eligibility.

A tax return must be submitted unless you were not required by law to file in which case you will need to complete a "Non-Tax Filers Statement".

### **Signatures**

Tax returns must be signed by the filer(s). Either an original or photocopied signature is acceptable. If you did not keep a copy of your Federal tax return, request an RTFTP printout or Letter 1722 from the Internal Revenue Service (800-829-1040) or a copy from your tax preparer.

### **Making Copies**

- Please be sure that copies of all pages of the Federal tax return and W2's are clear and readable.
- Be sure the first page of the return is not obscured by W2's when you make copies.
- If your return is printed front/back, be sure to copy both sides.
- Check your copies to be sure all figures are legible on both the Tax return and W2's.

### **Tax Filing Extensions**

You may have applied for and received an extension for submitting your Federal Income Tax Return. This extension does not waive the requirement that MMA must have a tax return for verification of federal aid. MMA needs to receive your completed tax return before being able to proceed with verification and determination of your aid eligibility.

**No application is complete until this Verification Worksheet, the FAFSA, Federal Tax Returns, and all W2's are received. Applying for financial aid has no bearing on an application for admission; however, financial aid applicants must be accepted for admission prior to receiving a financial aid award.**

**Mail this Completed Verification Worksheet and all Requested Documents to:**

**Maine Maritime Academy  
Financial Aid Office  
66 Pleasant Street  
Castine, ME 04420**

In-state: 800-464-6565  
Out-of-state: 800-227-8465  
Fax: 207-326-2515