SOUTHERN
METHODIST
UNIVERSITY

Division of Enrollment Services
Financial Aid

2011-2012 Independent Student Verification Statement

Your Free Application for Federal Student Aid (FAFSA) was selected for verification by the Federal Government or SMU. The verification process will be conducted by SMU in accordance with the U. S. Department of Education's rules 34 CFR 668, Subpart E. Required policies CFR 668.53

Please read carefully and complete each step:

1. **Complete the verification statement and worksheet.**

2. **Attach the requested tax returns (see Step 3). The return must contain inked signatures and dates. That is, the student or spouse (if married) must sign and date the return. A professional tax preparer's stamp is sufficient in lieu of the preparer's inked signature. A student and spouse filing separately must include both returns (signed and dated).**

3. **Submit the completed, signed, and dated verification statement, along with completed worksheet and tax returns to SMU's Division of Enrollment Services. If additional information or documents are required, you will be notified by SMU.**

4. **SMU requires all handwritten tax returns to be accompanied by an IRS tax transcript.** In addition, SMU reserves the right to request an IRS tax transcript as needed to resolve conflicting information and complete the verification process. If you need to provide an IRS tax transcript, please call the Internal Revenue Service (800-829-1040). Remember, the taxpayer needs to sign and date the tax transcript.

PLEASE NOTE: Official tax returns are required to complete verification. Failure in responding to this request will delay the awarding process; therefore, please respond promptly. Tax extensions are not acceptable documents for verification.

Thank you.

ATTN: Financial Aid Advisor
Southern Methodist University
Division of Enrollment Services
P. O. Box 750181
Dallas, TX 75275-0181
(214) 768-3417
FAX (214) 768-3878

2011-2012 Independent Student Verification Statement

Step 1: Student Information (please print)

Last name First name MI

SMU ID Number Last 4 digits of SSN E-mail address

Please circle one: Undergraduate/ Graduate Graduate Program of Study:_________________________

Permanent address (number, street, city, state, zip code) Student address

Permanent telephone number with Area Code Student Phone

Step 2: Family Information

- Print the names, age, & relationship of all 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, 2011 through June 30, 2012***; **and**
- Other people if they now live with you and will continue to provide more than half of their support from ***July 1, 2011 through June 30, 2012***.

- Also print the name of the **current** college for any household member who will be attending college/university at least half-time ***July 1, 2011 through June 30, 2012*** and will be enrolled in a degree, diploma, or certificate program.

Full Name	Age	Relationship	CURRENT College
		Self	SMU

Step 3: Student's Tax Forms and Income Information

- Check one box only. Tax returns include the 2010 IRS Form 1040, 1040A, or 1040EZ, a tax return for Puerto Rico or, a foreign income tax return. If you did not keep a copy of the tax return, request a copy from your tax preparer or request a tax transcript from the Internal Revenue Service (800-829-1040). Student or spouse must sign and date the tax transcript before sending to SMU.

  - ☐ Check here and attach a copy of your 2010 signed and dated tax return.

  - ☐ Check here if you will not file and are not required to file a 2010 US Income Tax Return **AND** attach a copy of your W-2, if applicable.

  Write in the amount of student's 2010 wages reported in Box 1 on the W-2 form, if applicable.
  $______________
  Write in the amount of spouse's 2010 wages reported in Box 1 on the W-2 form, if applicable.
  $______________

- Complete the attached worksheet. **Do not leave blanks**

____

Student signature **Date**

____

Spouse signature ***(if married)*** **Date**

Before you mail or fax this document,

Did you remember to:

- ☐ **Sign this Verification Statement?**
- ☐ **Include your Tax Return(s)?**
- ☐ **Complete W-2 income information?**
- ☐ **Sign your Tax Return(s)?**
- ☐ **Complete Worksheet?**

Over →

Enter and add together all of the following that apply to you and your parent(s). Place "0" in any space where there is nothing to report. <u>DO NOT LEAVE ANY BLANKS</u>.

Student	**Additional Financial Information Calendar Year 2010**	**Spouse**
$	Education credits (American Opportunity, 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 legal requirement. Don't include support for children in your (or your parents') household as reported in question 93 (or question 72 for your parents).	$
$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships	$
$	**<u>Taxable</u>** Student grant and scholarship aid **<u>reported to the IRS in your (or your parents') adjusted gross income</u>**. 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 your (or your parents') adjusted gross income. Combat pay is reported on the W-2 in Box 12, Code Q.	$
$	Earnings from work under a cooperative education program offered by a college.	$
$	**<- Total** **Total ->**	$

Student	Untaxed Income Calendar Year 2010	**Spouse**
$	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 + line 32 or 1040A-line 17	$
$	Child support **received** 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). **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 worker's compensation, disability, etc. Also include the making work pay tax credit from IRS Forms 1040 - Line 63, 1040A - line 40, or 1040EZ - line 8, and 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, Supplemental Security Income, Workforce Investment Act educational benefits, On-base military housing or a military housing allowance, combat pay (if you are not a tax filer), benefits from flexible spending arrangements, (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	$
$	Money **received**, or any money paid on your behalf (e.g., bills), not reported elsewhere on this form	$
$	<- Total Total ->	$