



2009-2010 Dependent 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 Verification Regulations 34 CFR 668, Subpart E. Required policies 34 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 returns must contain inked signatures and dates. That is, the student must sign and date his/her return; one parent must sign and date their return. A professional tax preparer's stamp is sufficient in lieu of the preparer's inked signature. Parents filing separately must include both returns.**
- 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 to respond 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

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Step 1: Student Information (please print)

Last name	First name	MI
SMU ID Number	Last 4 digits of SSN	E-mail Address
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 people in your parents' household. Include:
 - Self
 - Your parent(s)
 - Your parents' other children if (a) your parents will provide more than half of their support from **July 1, 2009 through June 30, 2010** OR (b) the children would be required to provide parental information when applying for Federal Student Aid; **and**
 - Other people if they now live with your parents, and your parents provide more than half of their support and will continue to provide more than half of their support from **July 1, 2009 through June 30, 2010**.

- Also print the name of the college for any household member who will be attending college at least half-time **July 1, 2009 through June 30, 2010** and will be enrolled in a degree, diploma, or certificate program. *Please note that we cannot consider parent(s) enrolled in college as a student, but they must still be indicated as part of the household.*

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 2008 IRS Form 1040, 1040A, 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). The Student must sign and date the tax transcript before sending it to SMU.
 - Check here and attach a copy of your signed and dated 2008 Tax Return.
 - Check here if you will not file and are not required to file a 2008 US Income Tax Return AND attach a copy of your W-2, if applicable.
- Write in the amount of your 2008 wages, if applicable, reported on student's W-2 form in Box 1: \$ _____
- Complete the attached worksheets for the student on the next page. **Do not leave blanks**

Step 4: Parent(s)' Tax Forms and Income Information

- Check one box only. Tax returns include the 2008 IRS Form 1040, 1040A, or 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If your parents did not keep a copy of the tax return, they should request a copy from their tax preparer or request a tax transcript from the Internal Revenue Service (800-829-1040). Both parents must sign and date the tax transcript before sending it to SMU.
 - Check here and attach copies of your signed and dated 2008 Tax Return.
 - Check here if you will not file and are not required to file a 2008 US Income Tax Return **AND** attach a copy of your W-2, if applicable.
- Write in the amount of the parents' wages, if applicable, reported on their W-2 forms:
Father's 2008 wages reported in Box 1 of the W-2 form: \$ _____
Mother's 2008 wages reported in Box 1 of the W-2 form: \$ _____
- Complete the attached worksheets for the parent(s) on the next page. **Do not leave blanks**

Student signature

Date

Parent signature

Date

Before you mail or fax this document,

Did you remember to:

- Sign and date this Verification Statement?**
- Include your Tax Return(s)?**
- Sign and date your Tax Return(s)?**
- Complete W-2 income information?**
- Complete Worksheet on the next page?**

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. **DO NOT LEAVE ANY BLANKS.**

Student	Additional Financial Information Calendar Year 2008	Parent(s)
\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 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 96 (or question 75 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.	\$
\$	<- Total Total ->	\$

Student	Untaxed Income Calendar Year 2008	Parent(s)
\$	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)	\$
\$	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. Don't include student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Workforce Investment Act educational benefits, 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 ->	\$