

# PEPPERDINE UNIVERSITY

## Graduate School of Education and Psychology

### 2014-2015 Household Resources Verification Worksheet (V6) Independent Student

Your 2014–2015 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this institutional verification document, attach any required documents, and submit the form and other required documents to us. We may ask for additional information. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

#### A. Independent Student's Information

_____ Last Name	_____ First Name	_____ M.I.	_____ Campus-Wide ID Number (CWID)
_____ Street Address (include apt. no.)			_____ Date of Birth
_____ City	_____ State	_____ Zip Code	_____ Email Address
_____ Home Phone Number (include area code)			_____ Alternate or Cell Phone Number

#### B. Independent Student's Family Information

Below, list the people in your household. Include:

- Yourself
- Your spouse, if you are married.
- Your children, and/or your spouse's children if you or your spouse will provide more than half of the children's support from July 1, 2014, through June 30, 2015, even if the children do not live with you.
- Other people if they now live with you and you and/or your spouse provide more than half of their support and will continue to provide more than half of their support through June 30, 2015.

For any household member who will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2014, and June 30, 2015, include the name of the college. *If more space is needed, attach a separate page with your name and CWID number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		<i>Self</i>		

*Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.*

Student's Name: \_\_\_\_\_ CWID: \_\_\_\_\_

**C. Independent Student's Other Untaxed Income for 2013**

If any item does not apply, enter "N/A" for Not Applicable where a response is requested, or enter 0 in an area where an amount is requested.

To determine the correct annual amount for each item: If you paid or received the same dollar amount every month in 2013, multiply that amount by the number of months in 2013 you paid or received it. If you did not pay or receive the same amount each month in 2013, add together the amounts you paid or received each month.

If you need more space, attach a separate page that includes your name and CWID number at the top.

**1) Payments to tax-deferred pension and retirement savings**

List any payments (direct or withheld from earnings) to tax-deferred pension and retirement savings plans (e.g., 401(k) or 403(b) plans), including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d with codes D, E, F, G, H, and S.

Name of Person Who Made the payment	Total Amount Paid in 2013

**2) Child support received**

Complete this section if you or your spouse, if married, paid child support in 2013.

Either I, or if married my spouse who is listed in Section B of this worksheet, paid child support in 2013. I have indicated below the name of the person who paid the child support, the name of the person to whom the child support was paid, the name of the child for whom child support was paid, and the total annual amount of child support that was paid in 2013 for each child. If asked by my school, I will provide documentation of the payment of child support. If you need more space, attach a separate page that includes your name and CWID number at the top.

Do not include foster care payments, adoption payments, or any amount that was court-ordered but not actually paid.

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Amount of Child Support Paid in 2013

Note: If we have reason to believe that the information regarding child support paid is not accurate, we may require additional documentation, such as:

- A copy of the separation agreement or divorce decree that shows the amount of child support to be provided;
- A statement from the individual receiving the child support certifying the amount of child support received; or
- Copies of the child support payment checks or money order receipts.

**3) Housing, food, and other living allowances paid to members of the military, clergy, and others**

Include cash payments and/or the cash value of benefits received.

Do not include the value of on-base military housing or the value of a basic military allowance for housing.

Name of Recipient	Type of Benefit Received	Amount of Benefit Received in 2013

Student's Name: \_\_\_\_\_ CWID: \_\_\_\_\_

**4) Veterans non-education benefits**

List the total amount of veterans non-education benefits received in 2013. Include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.

**Do not include** federal veterans educational benefits such as: Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits, Post-9/11 GI Bill

Name of Recipient	Type of Veterans Non-education Benefit	Amount of Benefit Received in 2013

**5) Other untaxed income**

List the amount of other untaxed income not reported and not excluded elsewhere on this form. Include untaxed income such as workers' compensation, disability, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040 Line 25, Railroad Retirement Benefits, etc.

**Do not include** any items reported or excluded in A – D above. In addition, do not include student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Investment Act (WIA) educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

Name of Recipient	Type of Other Untaxed Income	Amount of Other Untaxed Income Received in 2013

**6) Money received or paid on the student's behalf**

List any money received or paid on the student's behalf (e.g., payment of student's bills) and not reported elsewhere on this form. Enter the total amount of cash support the student received in 2013. Include support from a parent whose information was not reported on the student's 2014–2015 FAFSA. For example, if someone is paying rent, utility bills, etc., for the student or gives cash, gift cards, etc., include the amount of that person's contributions. Amounts paid on the student's behalf also include any distributions to the student from a 529 plan owned by someone other than the student or the student's parents, such as grandparents, aunts, and uncles of the student.

Purpose: e.g., Cash, Rent, Books	Amount Received in 2013	Source

Student's Name: \_\_\_\_\_ CWID: \_\_\_\_\_

#### D. Receipt of SNAP Benefits

By checking this box, I, the student, certify that a member of my household received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as the Food Stamp Program) sometime during 2012 or 2013. *SNAP may be known by another name in some states. For assistance in determine the name used in a state, please call 1-800-4FED-AID (1-800-433-3243).*

The household includes:

- Yourself
- Your spouse, if you are married.
- Your children, and/or your spouse's children if you will provide more than half of their support from July 1, 2014, through June 30, 2015, even if the children do not live with you.
- Other people if they now live with you and you and/or your spouse provide more than half of their support and will continue to provide more than half of their support through June 30, 2015.

*Note: If we have reason to believe that the information regarding the receipt of SNAP benefits is inaccurate, we may require documentation from the agency that issued the SNAP benefits in 2012 or 2013.*

#### E. Independent Student's 2013 Income Information

**TAX RETURN FILERS - Important Note:** The instructions below apply to you, the student, and your spouse, if married. Notify the financial aid office if you or your spouse filed separate IRS income tax returns for 2013 or had a change in marital status after the end of the 2013 tax year on December 31, 2013.

**Instructions:** Complete this section if you and your spouse, if married, filed or will file a 2013 IRS income tax return. *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov.* In most cases, no further documentation is needed to verify 2013 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

I, the student, have used the IRS DRT in *FAFSA on the Web* to transfer my 2013 IRS income tax return information into my FAFSA.

I, the student, have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer my 2013 IRS income tax return information into my FAFSA once the 2013 IRS income tax return has been filed.

I, the student, am unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2013 IRS Tax Return Transcript(s)**.

To obtain a **2013 IRS Tax Return Transcript**, go to [www.irs.gov](http://www.irs.gov) and click on the "Order a Return or Account Transcript" link. Make sure to request the "IRS Tax Return Transcript" and **not** the "IRS Tax Account Transcript." Use the Social Security Number (or the IRS individual taxpayer identification number) and date of birth of the first person listed on the 2013 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2013 IRS income tax return). In most cases, for electronic filers, a 2013 IRS Tax Return Transcript may be requested from the IRS within 2–3 weeks after the 2013 IRS income tax return has been accepted by the IRS. Generally, for filers of 2013 paper IRS income tax returns, the 2013 IRS Tax Return Transcript may be requested within 8–11 weeks after the 2013 paper IRS income tax return has been received by the IRS.

If you and your spouse filed separate 2013 IRS income tax returns, **2013 IRS Tax Return Transcripts** must be provided for both.

Check here if a **2013 IRS Tax Return Transcript(s)** is provided.

Check here if a **2013 IRS Tax Return Transcript(s)** will be provided later.

Student's Name: \_\_\_\_\_ CWID: \_\_\_\_\_

**NON-TAX RETURN FILERS - Important Note:** The instructions below apply to you, the student, and your spouse, if married.

**Instructions:** Complete this section if you and your spouse, if married, will not file and are not required to file a 2013 income tax return with the IRS.

**Check the box that applies:**

I, the student, (and, if married, my spouse) was not employed and had no income earned from work in 2013.

I, the student, (and/or my spouse if married) was employed in 2013 and have listed below the names of all employers, the amount earned from each employer in 2013, and whether an IRS W-2 form is provided. (Provide copies of all 2013 IRS W-2 forms issued to you and your spouse by your employers). List every employer even if the employer did not issue an IRS W-2 form. *If more space is needed, attach a separate page that includes your name and CWID number at the top.*

Employer's Name	2013 Amount Earned	IRS W-2 Provided?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000</i>	<i>Yes</i>

**F. Certification and Signature**

*I certify that all information reported on this form and on any attachments is complete and correct. If requested, I agree to provide documentation to support the information I have provided on this form.*

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

\_\_\_\_\_  
Student's Signature (Required)

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date

***Please mail, fax, or scan and email all required documentation to the GSEP Financial Aid Office:***

*6100 Center Drive, 5<sup>th</sup> Floor  
Los Angeles, CA 90045  
Phone: 310-568-5775  
Fax: 310-568-2399  
Email: GSEPFaid@pepperdine.edu*