2014-2015 Independent Student Verification Worksheet

Student Name: _________________________  Loyola ID: _________________________
(Please print) (Your 11-digit Loyola ID number begins 0000.)

To complete the processing of your financial aid for the 2014–2015 academic year, we need to verify the information you provided on the Free Application for Federal Student Aid (FAFSA). Please provide us with additional information about you and your spouse by completing all parts of this worksheet. Indicate $0 or N/A if items do not apply. Sign the Certification Statement on the final page before submitting the worksheet.

2014–2015 Independent Household Verification

Directions: List the number of people whom you or your spouse will support between July 1, 2014, and June 30, 2015. Include yourself (and your spouse). Include your or your spouse’s children if the children get more than half of their support from you or your spouse. Include other people only if they now live with and get more than half their support from you or your spouse, and will continue to get this support between July 1, 2014, and June 30, 2015. If there are more than ten people, please attach a sheet listing additional family members. (Support includes: money, gifts, loans, housing, food, clothes, car, medical and dental, payment of college costs, etc.)

<table>
<thead>
<tr>
<th>Full Name of Family Member</th>
<th>Age</th>
<th>Relationship Code (see codes below)</th>
<th>Attending undergraduate college at least half-time during 2014–2015?</th>
<th>Degree Program (for example: B.S., B.A.)</th>
<th>Name of College or University family member will attend in 2014–2015?</th>
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</thead>
<tbody>
<tr>
<td>1. You—the student</td>
<td></td>
<td>Yes</td>
<td>B.S.</td>
<td>Loyola University Chicago</td>
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<td>2. Spouse</td>
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Relationship Codes:
1 = Student’s parent
2 = Student’s stepparent
3 = Student’s brother/stepbrother or sister/stepsister
4 = Student’s husband or wife
5 = Student’s son or daughter
6 = Student’s grandparent
7 = Other (explanation must be supplied on separate page)
2014–2015 Untaxed Income Verification

Directions: The FAFSA asked for other income items, which were not included in the Adjusted Gross Income on your federal income tax return. The following list includes some of those items. Please complete the items below as of the date you signed the FAFSA. Enter all of the following information that applies to you or your spouse. List the total (annual) amount received in 2013. Indicate $0 if an item does not apply. Attach supporting documentation as appropriate.

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 Box 12a through 12d, codes D, E, F, G, H and S.

$ _____________

IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS 1040-line 28 & line 32 or 1040A-line 17.

$ _____________

Child support actually received for all children during 2013.

Note: Don’t include foster care or adoption payments.

☐ Check if benefits ended during 2013.

☐ Check if benefits will end during 2014.

What is the end date and total amount for 2014? _____________ $ _____________

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.

$ _____________

Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A (12a minus 12b). Exclude rollovers.

$ _____________

Housing, food, and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).

$ _____________

Veteran’s non education benefits (Disability, Death Pension, DIC and/or VA Educational Work-Study)

$ _____________

Worker’s Compensation

☐ Check if benefits ended during 2013.

$ _____________

2014-2015 Real Estate/Investment Verification

Directions: Please complete the following inquiry regarding your or your spouse’s their real estate/investment(s). DO NOT INCLUDE THEIR HOME OR PRIMARY RESIDENCE, but do include rental portions (if the residence is a duplex, two-flat or apartment building).

Concerning: Please give the full address of the property:*

__________________________________________ Unit # (if applicable) ____________

What was the total value of the investment as of the date the FAFSA was signed? $ _____________

What was the total debt owed on the investment as of the date the FAFSA was signed? $ _____________

Do you own the property solely or are they in partnership owning only a percentage?

If a partnership, what percentage of the property is owned by your parents? _________ %

If you have reported the total debt greater than the total value, explain why and attach supporting documentation. *Please attach additional sheets for additional properties.
Directions: Please indicate the value of cash, savings, checking accounts and investments – not including your home 401(k) or 403(b) value - as of the date you signed the FAFSA.

Student Assets
Cash, savings and checking accounts $ __________

Other investments (Include stocks, bonds, CDs, trust funds) $ __________

Spouse Assets
Cash, savings and checking accounts $ __________

Other investments (Include stocks, bonds, CDs, trust funds) $ __________

If you had a change in the value of your assets within the last year, please explain below. Be sure to address any circumstances in which the value of the asset (which paid interest or dividends reported on the 2013 federal tax return) has been reduced.

2014–2015 Income Exclusion Verification

Directions: Please complete the information below, applicable from January 1 to December 31, 2013. Indicate $0 or N/A if an item does not apply.

Education credits (Hope and Lifetime Learning Tax Credits) from IRS Form 1040-line 49; or 1040A-line 31. $ __________

Child support actually paid to the other parent in 2013 because of divorce or separation. Do not include support for children in your household. $ __________

Taxable earnings from Federal Work-Study or other need-based work programs $ __________

AmeriCorps awards – allowances and benefits $ __________

Certification Statement:
All of the information provided by me or any other person on this form is accurate and complete to the best of my knowledge. If requested, we agree to give proof of the information we have provided on this form. Proof may include court documents, canceled checks, etc. Failure to provide the requested information will result in the loss of financial aid eligibility.

Student Signature _______________________________ Date __________

Spouse’s Signature _______________________________ Date __________

The U.S. Department of Education no longer allows a preparer’s copy of tax returns to satisfy the Verification requirement. You may order a TAX RETURN TRANSCRIPT from the Internal Revenue Service online at www.irs.gov or by phone at 1-800-908-9946. Obtain a 2013 Federal IRS Tax Return Transcript and W-2 forms for yourself, your spouse (if married) or your parents/step-parent (if dependent). Note: If you used the IRS Data Retrieval tool to transfer your IRS income data to your FAFSA, you may not have to submit the IRS Tax Transcript.