

Name _____ University ID _____
(last) (first) (middle initial)
 Address _____ City _____ State _____ Zip Code _____
(PO Box, Street, Apt.#, etc.)
 Home Phone _____ Work Phone _____ Email _____ @siue.edu

Section A: Family Information / Household Size / Number in College

Fill in the charts below with information about household members.

Household Size

For help determining household size, read the attached "Guide to Reporting Household Size."

Name (first and last)	Age	Relationship to you
1. (your name)		self
2.		
3.		
4.		
5.		
6.		
7.		

Check this box if there are more than seven family members and attach a list of these people with the above information.

Number in College

For help determining number in college, read the attached "Guide to Reporting Number in College."

Student (Do not include Parent)	Social Security Number	College Name and Location
1. (Self)	xxx-xx-xxx	SIUE / Edwardsville, Illinois 62026
2.		
3.		
4.		

Instructions (Do not leave any sections blank.)

Dependent students - Complete the student and parent columns. **Both signatures required.**

Independent students - Complete the student/spouse column. **Student signature required.**

2008 Wages and Salaries	Student/Spouse	Parent(s)
<p><u>Tax Filer</u> - Attach appropriate SIGNED copy(ies) of the 2008 federal tax return (Form 1040, 1040A, 1040EZ, or IRS Form 1722), ALL schedules, and ALL corresponding W-2s to this form and submit to our office. IRS Form 8453 can not be used per Department of Education. If you did not keep a copy of the tax return, request a copy from your tax preparer or a copy of an Internal Revenue Service form that lists tax account information (800-829-1040). Tax returns not SIGNED will be returned for signatures, DELAYING the verification process.</p>	<p><input type="checkbox"/> Filed taxes in 2008.</p> <p>Attach 1040 & W-2s</p>	<p><input type="checkbox"/> Filed taxes in 2008.</p> <p>Attach 1040 & W-2s</p>
<p><u>Non-Filer</u> - If not required, per IRS 2008 Instruction Booklet, to file a 2008 federal tax return, list 2008 income sources/amounts and submit a copy of all W-2s.</p> <p>Employer/ Income Source _____</p> <p>Employer/ Income Source _____</p>	<p><input type="checkbox"/> Did not file taxes in 2008.</p> <p>Attach W-2s</p>	<p><input type="checkbox"/> Did not file taxes in 2008.</p> <p>Attach W-2s</p>

Complete every item. Enter ZERO (0) if it does not apply to you.

2008 Additional Financial Information	Student/Spouse	Parent(s)
Education Tax Credit (from IRS Form 1040--line 50 or 1040A--line 31)	\$	\$
Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household. Refer to Guideline to Reporting Household Size Information for dependent student or Guideline to Reporting Household Size Information for independent student, whichever is applicable.	\$	\$
Taxable earnings from need-based employment programs, such as Federal Work Study and need-based employment portions of fellowships and assistantships.	\$	\$
Student grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments) as well as grant and scholarship portions of fellowships and assistantships.		
Combat Pay	\$	\$
2008 Untaxed income	Student/Spouse	Parent(s)
Tax Deferred Pensions (reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F,G, H and S)	\$	\$
IRA and Keogh Deductions (IRS form 1040--line 28 + 32 or 1040A--line 17)	\$	\$
Total 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 IRA Distributions from IRS Form 1040--lines 15a minus 15b or 1040A--lines 11a minus 11b. Exclude rollovers. If negative, enter a zero.	\$	\$
Untaxed Pensions from IRS Form 1040—lines 16a minus 16b or 1040A—lines 12a minus 12b. Exclude rollovers. If negative, enter a zero.	\$	\$
Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and/or cash value of benefits received).	\$	\$
Veterans' non-education benefits such as Disability, Death Pension, Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.	\$	\$
Other untaxed income, such as workers' 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 money paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$	\$ XXXXXXXX

If reported 2008 income has decreased, you may qualify for a special circumstance calculation. Call our office for information.

<p>Veteran's Benefits</p> <p>Will you receive veterans' education benefits between July 1, 2009 and June 30, 2010? If yes, please submit (Veterans' Benefits) VETBEN form (www.siu.edu/financialaid/forms.shtml). Scroll down to Other Financial Aid Forms; click on Adobe icon in 2009-2010 column).</p>
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<p>Section B: Required Certification and Signatures Check form again for blank lines, which may result in form being returned to you, delaying the processing of your federally required verification.</p> <p>I understand that submitting this information has started the verification process. Additional information may be necessary. I will be prepared to make my first payment, when due, if verification hasn't been completed at that time. I (we) certify all information shown on this form is complete and correct. WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both by the U.S. Department of Education.</p>
<p>_____ Student signature (Required)</p> <p align="right">_____ Date</p>
<p>_____ Parent signature (One parent whose information is provided on FAFSA) (Required if dependent student)</p> <p align="right">_____ Date</p>
<p>_____ Parent address (street/city/state/zip)</p> <p align="right">_____ Parent phone</p>

Guideline to Reporting Household Size Information

Dependent Students page 1
Independent Students page 2

Below you will find helpful information about determining your parent(s) household size. Read this information carefully. If you have a situation that is not addressed here and you cannot determine your parent(s) household size with these instructions, contact our office at (618) 650-3880 and speak with an advisor for assistance.

Household Size Definition for Dependent Students

Include the people whom your parents will support between July 1, 2009 and June 30, 2010, including:

- **Yourself**
- **Parent(s) and/or stepparent:** If your parents are both living and married to each other (not separated), list both. If your parent was widowed and remarried as of the day you signed your FAFSA, list your parent and stepparent. If your parents are divorced or separated, list the parent with whom you lived more during the past 12 months. If you did not live with one parent more than the other (or neither), list the parent who gave you the most **support*** during the last 12 months, or during the most recent year that you received **support*** from a parent. Also, include the stepparent if parent has remarried.
- **Parents' dependent children** if your parent(s) provides **more than half** of the **support*** for any dependent child, even if that person is away at college or not living in your parent(s) home.
- **Other people** as long as they physically resided with your parent(s) on the date you filed your FAFSA and will continue to reside with your parent(s) and your parent(s) will continue to provide **more than half** of their **support*** through June 30, 2010.

***Support** includes money, gifts, loans, housing, food, clothes, car payments or expenses, medical and dental care, and payment of college costs.

If you are a dependent student, always include yourself, even if you do not live with your parent(s). Also, always include your parent(s). *Note: The federal definition of "parents" defines only your custodial parent and their **current** spouse. If your natural parents are separated or divorced, the non-custodial parent is not to be listed in the table, nor are any individuals residing with the non-custodial parent. If your custodial parent is remarried, the stepparent's information must be included or you will not be considered for federal student financial aid.*

*To determine whether to include children in the household size, the **support*** test is used because there may be situations in which a parent supports a child who does not live with the parent. In such cases, the parent who provides **more than half** of the child's **support*** may claim the child in his or her household size. The child need not be claimed on the federal tax return. Household size and tax exemptions are not necessarily the same. Exemptions look at the previous year or tax year and household size refers to the school year for which the student is applying for aid.*

Include anyone in the **immediate** family (your parents' other dependent children) who receive **more than 50% support*** from your parents, even if that person does not reside in the house. For example, a sibling who is over 24 but still receives the majority of his/her **support*** from the parents can be included. You may also include your parents' unborn child, if that child will be born before June 30, 2010. If there is a medical determination of a multiple birth, then all expected children can be included.

Include any other person who resides in the household and receives **more than 50% support*** from the parent(s), as long as they physically resided with your parents on the date you filed your FAFSA and will continue to reside with your parent(s), and the **support*** is expected to continue through June 30, 2010.

If you live with a relative other than your parent(s), you may report their information on your FAFSA ONLY if that relative is your adoptive parent (adoption papers required; not guardianship papers). Dependent students can be considered dependent only on their parent(s) and must report only information from their parent(s) household.

If you live with a girlfriend/boyfriend or anyone else besides your parent(s), do not use that information for household size. When you are a dependent student, you must report only information from your parent(s) household, even if you do not live there.

Guideline to Reporting Household Size Information

Independent Students

Below you will find helpful information as to how to determine your household size. Read this information carefully. If you have a situation that is not addressed here and you cannot determine your household size with these instructions, contact our office at (618) 650-3880 and speak with an advisor for assistance.

Household Size Definition for Independent Students

Include the people whom you/your spouse will support between July 1, 2009 and June 30, 2010, including:

- **You**
- **Your spouse** unless your spouse is not living in the household as a result of death, separation, or divorce.
- **Your children** if they will receive **more than half** of their **support*** from your household between July 1, 2009 and June 30, 2010.
- **Your unborn child** if that child will be born before the end of the award year (June 30, 2010) and your household will provide **more than half** of the child's **support***. If there is a medical determination of a multiple birth, then all expected children can be included.
- **Other people** if they lived with you on the date you signed the FAFSA, are currently living with you and will continue living with you, **AND** you will provide **more than half** of their **support*** until June 30, 2010.

***Support** includes money, gifts, loans, housing, food, clothes, car payments or expenses, medical and dental care, and payment of college costs.

Always include yourself and your spouse unless your spouse has died, you are divorced, or you are separated. A couple doesn't have to be legally separated. The couple may consider themselves informally separated when one of the partners has left the household for an indefinite period of time and the marriage is severed. Temporary absences for special circumstances such as for business, medical care, school, or military service do not qualify as a separation.

To determine whether to include children in your household size, the **support*** test is used because there may be situations in which you support a child who does not live with you (such as having a child whom you **support***, but lives away at college). In such cases, the parent who provides **more than half** of the child's **support*** may claim the child in his or her household size. **It does not matter which parent claims the child as a dependent for tax purposes.**

When you include an unborn child, we may ask you to supply a statement from your physician showing the expected due date of the child. You must provide **more than 50%** of that child's **support*** from birth until June 30, 2010.

When you include "other people" who are not your spouse or your children, those people must have physically resided with you and your spouse on the day you filed your FAFSA AND you/your spouse must provide **more than half** of their **support*** then and through June 30, 2010. We may ask for income information, such as a tax return from that person. A person with their own source of income may live with you and be self-supporting. However, they may have their own income but need financial assistance from you which equals **more than half** of their total **support***.

Guide to Reporting Number in College

Who qualifies to be counted in the number in college?

Dependent Students: Any person (other than your parents) who is counted in the household and will be attending any term of the academic year at least half time qualifies to be counted. The person must be working toward a degree or certificate leading to a recognized education credential at a postsecondary school eligible to participate in the federal student aid programs. You (the student) need not be enrolled half time to be counted in the number in college. A person included in number in college does not have to physically live in your parents' household. A household member who lives away at college but still receives more than half of their support from your parents should be included in number in college.

Independent Students: Any person who is counted in your household and will be attending any term of the academic year at least half time qualifies to be counted. The person must be working toward a degree or certificate leading to a recognized education credential at a postsecondary school eligible to participate in the federal student aid programs.