2015-16 INDEPENDENT Verification Worksheet

Your Free Application for Federal Student Aid (FAFSA) has been selected for review in a process called, “Verification.” During this process, the information from your FAFSA will be compared with your Federal IRS tax information as well as other financial documents. If there are differences, your information will be corrected. You must complete and sign this worksheet, attach all of the required documents, and submit it to the Financial Aid Office at Eastern Oregon University.

Verification must be completed before you will be eligible for Federal Aid.

Instructions and F.A.Q. viewable at: www.eou.edu/fao/verification/

1. STUDENT INFORMATION

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>M.I.</th>
<th>Student ID Number</th>
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Address (Include apartment number)

City     State     Zip

Date of Birth (mm/dd/yyyy)

Phone number (include area code)

Email

2. HOUSEHOLD INFORMATION

Include:
1. Yourself (and your spouse),
2. Your children, if you will provide more than half of their support between July 1, 2015 and June 30, 2016, and
3. Other people if they now live with you, you provide more than half of their support and you will continue to provide more than half of their support between July 1, 2015 and June 30, 2016.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Age</th>
<th>Relationship to You</th>
<th>Name of College Attending</th>
<th>Will be Enrolled at Least Half Time?</th>
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<tr>
<td></td>
<td></td>
<td>Self</td>
<td>Eastern Oregon University</td>
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If more space is needed, provide a separate page with the student’s name and ID number at the top.

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.
3. INCOME VERIFICATION

Please Read This Section

IF YOU FILED TAXES: The easiest way to verify income is to use the IRS Data Retrieval Tool (DRT) when completing or correcting your FAFSA on the Web. This tutorial on the WWW will help you through the process: www.irsdataretrievaltool.com. If you did not use the IRS DRT when completing or correcting your FAFSA, you must provide an IRS Tax Return Transcript (TRT). To view AND print an IRS TRT (only if your taxes have already been processed (2-3 weeks after submitting electronically, 6-8 weeks after submitting by mail)) please go to www.irs.gov/Individuals/Get-Transcript or call 1-800-908-9946 to order by phone, and it will be mailed to you.

We must also collect copies of: W2’s, Schedule C (business) and Schedule F (fam), if applicable, for student and spouse.

a. Student and Spouse Income and Asset Verification (Select One Case)

☐ I used the Internal Revenue Service (IRS) Data Retrieval Tool (DRT) process when updating the 2015-16 FAFSA on _______ (date).

☐ All Respective (Student, Spouse, Father & Mother) 2014 W-2’s are attached!

I am unable or chose not to use the IRS DRT with FAFSA on the Web, and instead am attaching my 2014 Federal IRS Tax Return Transcript (TRT) and ALL 2014 W-2’s.

(Very Uncommon) I was unable to obtain an IRS Tax Return Transcript following the period after the IRS processes 2014 income tax returns. I am attaching the following, alternate documentation. ALL three of the following items are required, without exception:

1. A copy of the IRS response that was provided to the tax filer stating that the IRS could not provide the requested transcript. The copy of the IRS response must be signed and dated by the tax filer.
2. A signed copy of the relevant (i.e., applicant, spouse) 2014 IRS tax return.
3. Important: In addition to the documentation specified above, the tax filer must also provide to the institution a completed and signed IRS Form 4506-T-EZ or Form 4506-T that includes on line 5 the name, address, and telephone number of Eastern Oregon University as the third party to whom the IRS is to mail the 2014 IRS Tax Return Transcript.

I filed an amended return, an extension, or foreign tax return. (Please see special instructions at www.eou.edu/fao/verification/)

I will not file and am not required to file a 2014 Federal tax return. Please attach a signed letter explaining how you lived on so little income. In that letter list each source of income individually with the amounts received. If possible, provide proof of receipt.

☐ If you had earnings from work, write in the amount you (and your spouse) earned in 2014 and enclose all of your (and your spouse’s) 2014 W-2’s. $ _________ (you) $ ___________ (spouse)

b. ROLLOVER: If you had a retirement fund rollover in 2014, please list the amount: $ ___________.

Read the tables below carefully. List all sources of untaxed income. Report total received in 2014 (enter $0 if nothing received; do not leave blank).

c. Student Asset Information

<table>
<thead>
<tr>
<th>For the following three questions, answer as of the day you filed the FAFSA.</th>
<th>(Spouse &amp; Student)</th>
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<tbody>
<tr>
<td>What was your total balance of cash, savings, and checking accounts?</td>
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<td>What was the net worth of your investments, including equity in real estate? Don’t include the home in which you live or retirement plans and pension funds.</td>
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<td>What was your equity in businesses and/or investment farms? Don’t include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.</td>
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</table>
d. Additional Financial Information – Calendar Year 2014 Totals

<table>
<thead>
<tr>
<th>(Spouse &amp; Student)</th>
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<tbody>
<tr>
<td>Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.</td>
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<tr>
<td>Taxable student grant and scholarship aid reported to the IRS in your adjusted gross income. Include AmeriCorps benefits, as well as grant and scholarship portions of fellowships and assistantships.</td>
<td></td>
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<tr>
<td>Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. <strong>Don’t include</strong> untaxed combat pay.</td>
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<tr>
<td>Earnings from work under a cooperative education program offered by a college.</td>
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e. Child Support PAID

<table>
<thead>
<tr>
<th>(Spouse &amp; Student)</th>
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<tbody>
<tr>
<td>Did you or your spouse pay child support during the year 2014?</td>
<td>✔</td>
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<table>
<thead>
<tr>
<th>Child for whom support was paid</th>
<th>Age of child</th>
<th>Person to whom support was paid</th>
<th>Who paid support</th>
<th>Amount in 2014</th>
<th>Total paid in 2014</th>
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If you need to add additional children, please attach a separate page with all of the requisite information.

f. Untaxed Income Information – Calendar Year 2014 Totals

<table>
<thead>
<tr>
<th>(Spouse &amp; Student)</th>
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</thead>
<tbody>
<tr>
<td>Tax-deferred pension and retirement savings plans payments, including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H, and S.</td>
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<tr>
<td>Child support received for all children. <strong>Don’t include</strong> foster care or adoption payments.</td>
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<tr>
<td>Allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits) except the value of on-base military housing or military allowance for housing.</td>
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</tr>
<tr>
<td>Veterans noneducation benefits, such as Disability, Death Pension, or Dependency &amp; Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.</td>
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</tr>
<tr>
<td>Other untaxed income not reported such as workers’ compensation, disability, etc. Also include the untaxed portions of health saving accounts (IRS Form 1040, Line 25).</td>
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</tr>
<tr>
<td>Money received, or paid on your behalf (e.g., bills), not reported elsewhere. This includes money received from a parent whose financial information is not reported here and is not child support.</td>
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<tr>
<td>Resources or benefits not appearing on the FAFSA, such as in-kind support from a relative or a government agency.</td>
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g. SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM (SNAP) / FOOD STAMPS

Did any member of your household listed on page one receive Food Stamp Benefits in 2013 or 2014? Yes: ✔ No: ☐

4. CERTIFICATIONS AND SIGNATURES

By signing this worksheet, I certify that all of the information reported is complete and correct. I also acknowledge that I have read and agree to comply with all verification policies as stated by the University. Failure to submit information in a timely fashion may result in the application being filed as inactive with no further consideration and no federal aid for the academic year.

Student must sign.

<table>
<thead>
<tr>
<th>Student</th>
<th>Date</th>
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**WARNING:** If you purposefully give false or misleading information, you may be fined, sentenced to jail, or both.

- 2015-16 Independent Verification Worksheet (V1V5-6)