Texas A&M University-San Antonio

2014-2015 VERIFICATION CHECKLIST

V1 Standard Verification
- Institutional Verification Form (*signed)
- Household Resource Worksheet (*signed)
- Student/Spouse/Parent 2013 W-2 Forms
- Student/Spouse/Parent 2013 IRS Tax Transcript (*signed)

V2 See a Financial Aid Officer

V3 Child Support Verification
- Child Support Worksheet (*signed)

V4 Custom Verification
- Household Resource Worksheet (*signed)
- High School Completion Form (signed)
- Identity and Statement Form (signed)

V5 Aggregate Verification
- Institutional Verification Form (*signed)
- Household Resource Worksheet (*signed)
- High School Completion Form (signed)
- Identity and Statement Form (signed)
- Student/Spouse/Parent 2013 W-2 Forms
- Student/Spouse/Parent 2013 IRS Tax Transcript (*signed)

V6 Household Resources
- Institutional Verification Form (*signed)
- Household Resource Worksheet (*signed)
- Student/Spouse/Parent 2013 W-2 Forms
- Student/Spouse/Parent 2013 IRS Tax Transcript (*signed)

*Forms, worksheets, and tax transcripts require signatures from student, spouse, and parents (for dependent students).
A. Student Information

The law requires us to verify information submitted on the FAFSA before awarding Federal Aid. If there are differences between your application information and your financial documents, TAMUK may need to make corrections. If the requested documents are not received, any aid that you have received may be cancelled. Requested information must be reviewed under the financial aid program rules (34 CFR, Part 668). Please Use Black or Blue Ink.

What you need to do:
1. Collect your (and your spouse's or parents') 2013 IRS Tax Return Transcripts and W-2 forms.
2. Complete the appropriate sections and sign where required.
3. Submit this completed worksheet, 2013 IRS Tax Return Transcript and copies of original W2 forms.

Note: Tax Return Transcripts can be downloaded online at www.irs.gov or by calling 1.800.908.9946.

<table>
<thead>
<tr>
<th>Last Name</th>
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B. Dependency Status. (You are considered independent if one or more of the following conditions apply)

☑ At any time on or after July 1, 2013, did your high school or school district liaison determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?
☑ At any time on or after July 1, 2013 did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?
☐ At any time on or after July 1, 2013, did the director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban development determine you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?

☐ Were you born before January 1, 1991?
☐ As of today, are you married? (Also answer "Yes" if you are separated but not divorced.)
☐ Are you a veteran of the U.S. Armed Forces?

☐ Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?
☐ At the beginning of the 2014-2015 school year, will you be working on a master's or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD, graduate certificate, etc.)?
☐ Do you now have or will you have children who will receive more than half of their support from you between July 1, 2014 and June 30, 2015?

☐ At any time since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court?
☐ As determined by a court in your state of legal residence, are you or were you an emancipated minor?
☐ Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now through June 30, 2015?

☐ As determined by a court in your state of legal residence, are you or were you in legal guardianship?

C. Household Information (Follow the instructions below to complete this section)

Dependent Students: List the people in your parent’s household. Include yourself, your parents you live with, your parents’ other children if (a) your parents will provide more than half of their support between July 1, 2014 and June 30, 2015, or (b) the children could answer “No” to every question in Section B of this form, and other people if they now live with your parents, your parents provide more than half of their support and your parents will continue to provide more than half of their support between July 1, 2014 and June 30, 2015.

Independent Students: List the people in your household. Include yourself (and your spouse); your children, if you will provide more than half of their support between July 1, 2014 and June 30, 2015; and other people if they now live with you, or you provide more than half of their support and you will continue to provide more than half of their support between July 1, 2014 and June 30, 2015.

Household Members in College: Write the name of the college for any family member, excluding your parents, who will be attending college at least half-time between July 1, 2014 through June 30, 2015, and will be enrolled in a program that leads to a college degree or certificate. If you need more space, attach a separate page. (Parents are not counted as household members in college)

<table>
<thead>
<tr>
<th>Name</th>
<th>Age</th>
<th>Relationship</th>
<th>College this person will be attending at least half-time during 2014-2015 School Year</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>Self</td>
<td>TAMUK</td>
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</table>
D. Tax Forms and Income Information

Check the box for those people who are required to file a tax return. All tax filers must submit a copy of their 2013 IRS Transcript and W2's.

☐ You  ☐ Your spouse  ☐ Your father  ☐ Your mother

Check the box for those people who did not and are required to file a 2013 Federal Income Tax return.

☐ You  ☐ Your spouse  ☐ Your father  ☐ Your mother

Non-filers MUST list employer(s) and any income received in 2013 and attach a copy of their W-2s or other earnings statements.

<table>
<thead>
<tr>
<th>Name of Employer</th>
<th>Student Amount</th>
<th>Spouse or Parent(S) Amounts</th>
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<tbody>
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Both tax filers and non-tax filers must list below the total annual amount of any untaxed income received in 2013. Enter zero’s if no funds were received. If this section is left blank the form will be considered incomplete and will affect the processing and the amount of your award package.

<table>
<thead>
<tr>
<th>Student/Spouse</th>
<th>2013 ADDITIONAL FINANCIAL INFORMATION</th>
<th>Parent(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040—line 49 or 1040A—line 31.</td>
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<tr>
<td></td>
<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></td>
<td>Taxable student grant and scholarship aid reported to the IRS in your (or your parents’) adjusted gross income. Includes AmeriCorps benefit (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.</td>
<td></td>
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<tr>
<td></td>
<td>Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).</td>
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<tr>
<td></td>
<td>Earnings from work under a cooperative education program offered by a college.</td>
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</table>

2013 UNTAXED INCOME

Payments to tax-deferred pension and retirement 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. Don’t include amounts reported in code DD (employer contributions toward employee health benefits).

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

Child support received for all children. Don’t 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). Don’t include the value of on-base military housing or the value of basic military allowance for housing.

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 workers’ compensation, disability, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040—line 25. Don’t include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.

Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form

E. Sign this Worksheet

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. If dependent, at least one parent must sign. Warning: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Date: ___________________________ Date: ___________________________

Student’s Signature

Spouse/Parent’s Signature (Dependent Students Only)

Student is required to sign if they are over 18 years old. Date: ___________________________
A. STUDENT INFORMATION

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>MI</th>
<th>Student ID (K Number)</th>
<th>Date of Birth</th>
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<tr>
<th>Cell Phone Number</th>
<th>E-mail Address</th>
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B. CHILD SUPPORT PAID

Did you or your parent(s) pay child support in 2013? YES NO

If yes, please complete the section below. Don’t include support for children reported in your household.

<table>
<thead>
<tr>
<th>Name of Person Who Paid Child Support</th>
<th>Name of Person to Whom Child Support was Paid</th>
<th>Name of Child for Whom Support Was Paid</th>
<th>Amount of Child Support Paid in 2013</th>
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C. FOOD STAMPS

In 2012 or 2013, did you (or your spouse), your parents or anyone in your parents household receive Supplemental Nutrition Assistance Program (SNAP/Food Stamps)? YES NO

☐ If yes, please attach proof such as the SNAP Benefits Notice of Eligibility. A copy can be downloaded at www.yourtexasbenefits.com.

D. OTHER RESOURCES

List the sources and amounts of any additional income that the family receives. You (your spouse)/ your parent(s) must explain how the family was financially supported during the 2013 calendar year.

<table>
<thead>
<tr>
<th>Source of Untaxed Income Received</th>
<th>Name of Person who Received Benefit</th>
<th>Amount Received in 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>EX: Supplemental Security Income, TANF, WIC, Child Support, Unemployment, Social Security Benefits</td>
<td>Household Member Name</td>
<td>Enter Annual Amount</td>
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E. SIGNATURES

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. If dependent, at least one parent must sign. Warning: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both. State law requires that you be informed of the following: (1) with few exceptions, you are entitled on request to be informed about the information the University collects about you by use of this form; (2) under sections 552.021 and 552.023 of the Government Code, you are entitled to receive and review the information; and (3) under section 559.004 of the Government Code, you are entitled to have the University correct information about you that is incorrect.

Date ____________________________

Student’s Signature

Date ____________________________

Spouse / Parent’s Signature (Dependent Students Only)
Institutional High School Completion Worksheet
Award Year 2014-2015

Mail: Texas A&M University-Kingsville • Office of Student Financial Aid
• 700 University Boulevard - MSC 115 • Kingsville, Texas 78363
In Person: Memorial Student Union Building 1st Floor Room 132

A. Student Information

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B. High School Completion Documentation

Attach this form to one of the following documents that indicate the student's high school completion status as of the date the student will begin college in 2014–2015:

☐ Copy of High School Diploma

☐ Copy of Final Official High School Transcript showing date when diploma was awarded

☐ Copy of General Educational Development (GED) certificate or GED Transcript

☐ Official Academic transcript indicating student successfully completed a two-year program (Associates Degree)

☐ If State law requires a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential.

☐ If State law does not require a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a transcript or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and documents the successful completion of a secondary school education in a homeschool setting.


Student’s Signature ___________________________ Date ___________________________

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B. **Identity**

When presenting this form, you will be required to provide a valid government-issued photo identification which will be copied by an authorized staff member and submitted along with this form to the Financial Aid Office. Acceptable photo identification includes, but is not limited to a driver’s license, identification card, military identification, or passport. If the student is unable to appear in person, a Notary must complete Section D of this worksheet.

C. **Statement of Educational Purpose**

I certify that I ______________________ am the individual signing this Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Texas A&M University-Kingsville for the 2014-2015 school year.

_____________________________ Date

Student’s Signature

_____________________________

Student’s ID Number

D. **Notary’s Certificate of Acknowledgement** (To be completed if the student is unable to appear in person).

The State of _____________

County of ____________________

Before me, a Notary Public, on this day personally appeared ______________________, known to me (or proved to me on the oath of ____________________) to be the person whose name is subscribed to the foregoing instrument and acknowledged to me that he executed the same for the purpose and consideration therein expressed.

Given under my hand and seal of office this _______ day of ____________________ A.D. 20____

_____________________________

Notary Public, State of Texas

(PERSONALIZED SEAL)

(Print name of Notary Public here)

My commission expires the _______ day of _____________ 20_____