

California Institute of Technology

2007-2008 Graduate Student Independent Verification Worksheet

Your application was selected for review in a process called "Verification." In this process, we will be comparing information from your application with signed copies of your (and your spouse's, if you are married) 2006 Federal tax forms, or with W-2 forms or other financial documents. The law says we have the right to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, the financial aid administrator reviewing your file may send corrections electronically, to have your information reprocessed.

Try to complete verification as soon as possible, so that your financial aid won't be delayed. Please contact the Caltech Financial Aid Office at (626) 395-6280 if you need assistance.

What you should do

1. Collect your (and your spouse's) financial documents (signed Federal income tax forms, W-2, 1099 forms and all schedules and attachments).
2. Contact the Caltech Financial Aid Office if you have questions about completing this worksheet.
3. You (and you spouse, if you are married) must fill in and sign the worksheet.
4. Submit the completed worksheet, tax forms, and any other requested documents to the Caltech Financial Aid Office.

We must review the requested information under the financial aid program rules (CFR Title 34, Part 668).

A. Student Information

Last Name First Name M.I.

Social Security Number

Permanent Address (include apt. no)

Date of Birth

City State ZIP code

Phone Number (include area code

Expected Graduation (Month/Year)

E-Mail Address

B. Family Information

List the people that you (and your spouse) will support between July 1, 2007 and June 30, 2008.

Include:

- yourself
- your spouse
- your dependent children (if you provide more than half support).

Include other people as part of your family only if:

- they now live with you and receive more than half their support from you (or your spouse).

AND

- they will continue to receive more than half their support from you from July 1, 2007 through June 30, 2008.

Write the names of all family members, including yourself. Also write in the name of the college for any family member who will be attending college at least half-time between July 1, 2007 and June 30, 2008 and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College to be attended in 2007 - 2008
Sample Spouse	21	Wife	Central University
		Self	Caltech

C. Other Information (you only need to complete the items we have checked below)

- The amount your parent(s) will contribute to you in 2007-2008 is \$ _____
- Send a copy of your Marriage Certificate to the Caltech Financial Aid Office
- Other: _____

D. Student's Tax Forms and Income Information

1. For non-tax filers and all tax filers (include 2006 IRS Form 1040, 1040A, 1040EZ, TeleFile Tax Record, a tax return from Puerto Rico or a foreign income tax return). If you did not keep a copy of the tax return, request a tax return transcript from the Internal Revenue Service or a copy from your tax preparer.
 - Check and attach signed tax return.
 - Check and complete: signed tax return will be mailed to Caltech by _____ (date).
 - Check here if you will not file and are not required to file a 2006 U.S. Income Tax Return. The Caltech Student Certification of Non-filing form must be completed. If you have not already received this form, please contact the Caltech Financial Aid Office.
2. Amounts received for child support and all other untaxed income.

Sources of Untaxed Income	2006 Amount	Est. 2007 Amount

Outside Resources for Education (Scholarships, tuition remission)	2007-2008 Amount
Support from Parents (if applicable)	

E. Spouse's Tax Forms and Income Information (if student is married)

1. For non-tax filers and all tax filers (include 2004 IRS Form 1040, 1040A, 1040EZ, TeleFile Tax Record, a tax return from Puerto Rico or a foreign income tax return). If your spouse did not keep a copy of the tax return, request a tax return transcript from the Internal Revenue Service or a copy from your tax preparer.
 - Check and attach signed tax return.
 - Check and complete: signed tax return will be mailed to Caltech by _____ (date).
 - Check here if your spouse will not file and are not required to file a 2006 U.S. Income Tax Return. The spouse section of the Caltech Student Certification of Non-filing form must be completed. If you have not already received this form, please contact the Caltech Financial Aid Office.
2. Amounts received for child support and all other untaxed income.

Sources of untaxed income	2006 Amount

