

University of Rochester
2004-2005 Financial Aid Verification Statement
Undergraduate Dependent Students

D

Student's Name _____ Social Security # _____

Home Address _____

CPU Box # _____ E-mail Address _____

Home Phone _____ Campus Phone _____

Parents' Business Phone Numbers: _____

Parents' Email Addresses: _____

INSTRUCTIONS

**All Documents are due in the Office of Student Financial Assistance by
April 15, 2004.**

1. Complete the 2004-2005 Free Application for Federal Student Aid (FAFSA). UR school code is 002894. We encourage students to complete the FAFSA online at www.fafsa.ed.gov by using the PIN # provided by the Department of Education.
2. If you are a New York State resident, indicate such on the FAFSA. The state will then send the New York State TAP application to you. Be sure to list University of Rochester's code number of 1015.
3. Complete all sections of this form. **(Incomplete forms will be returned and may delay your award!)**
4. Enclose signed copies of all pages and schedules of all requested 2003 tax returns and W-2 forms.
5. If you have any questions, contact the Office of Student Financial Assistance.
6. All financial aid documents are due in the Office of Student Financial Assistance by **April 15, 2004**. **Applications received after this date will be considered late and may not receive consideration for all funds. Send to:**

Office of Student Financial Assistance	phone: (585) 275-3226 (800) 881-8234
University of Rochester	fax: (585) 756-7664
Third Floor, Meliora Hall, P.O. Box 270261	e-mail: help@finaid.rochester.edu
Rochester, New York 14627-0261	www.rochester.edu/financialaid

A. GENERAL APPLICATION INFORMATION

- Date you mailed or electronically filed the FAFSA: _____
- Period for which aid is requested:
 - Fall 2004, Spring 2005
 - Fall 2004 only
 - Spring 2005 only
- Enrollment Status: Full Time Part Time
Please note that part-time students are not eligible for University grants and scholarships or NYS TAP.
- Do you plan to study abroad? Yes No If yes, when? Fall 2004 Spring 2005
Please note that students on non-UR programs will not be eligible for the same aid as those on UR programs.
- When do you plan to graduate from the University of Rochester? _____ month _____ year

C. STUDENT'S INCOME INFORMATION ~~~~~

1. Federal Income Tax Returns (**Do not leave blank.**)

- Enclosed is a signed copy of all pages and schedules of my 2003 IRS Form 1040, 1040A, 1040 EZ, Puerto Rican, or foreign tax return.
 - If you did not keep a copy, you may request a full format form from your tax preparer. You may also call the IRS at (800) 829-1040 and request a transcript.
 - If you completed a Telefile, you must provide a signed copy of the worksheet that includes the 6 digit IRS confirmation number.
- I am not and will not be required to file a 2003 U.S. Income Tax Return.
 - Please note that you must also complete items 2 and 3.

2. Wage Earnings Statements (**Do not leave blank.**)

- If you participated in a work-study program, please include the W2's.
- Enclosed are copies of all my 2003 W-2 wage earning statements.
- No W-2 wage earning statements are enclosed because I did not earn any wages in 2003.

3. Untaxed Earnings and Benefits (**Do not leave blank.**)

- List all sources of income and benefits you received in 2003 that do not appear on your tax return.
 - Even if you did not file a tax return, you must complete this section.

<u>Sources of Untaxed Income or Benefits</u>	<u>2003 Total Amount</u>
_____	_____
_____	_____
_____	_____

- I did not receive any non-taxable income or benefits in 2003.

D. PARENTS' INCOME INFORMATION ~~~~~

1. Federal Income Tax Returns (**Do not leave blank.**)

- Enclosed is a signed copy of all pages and schedules of my parents' 2003 IRS Form 1040, 1040A, 1040EZ, Puerto Rican, or foreign tax return.
 - If your parents are married, but filing separate returns, be sure to include copies of both returns.
 - If your parents did not keep a copy, they may request a full format form from their tax preparer. They may also call the IRS at (800) 829-1040 and request a transcript.
 - If they completed a Telefile, you must provide a signed copy of the worksheet that includes the 6 digit IRS confirmation number.
- My parents are not and will not be required to file a 2003 U.S. Income Tax Return.
 - Please note that you must also complete items 2 and 3.

2. Wage Earning Statements (**Do not leave blank.**)

- Enclosed are copies of all of my parents' 2003 W-2 wage earning statements.
- No W-2 wage earning statements are enclosed because my parents were self-employed in 2003.
- No W-2 wage earning statements are enclosed because my parents did not earn any wages in 2003.

3. **Untaxed Earnings and Benefits (Do not leave blank.)**

- List all sources of untaxed income and benefits your parents received in 2003.
- Even if your parents did not file a tax return, they must complete this section.

Parent's Sources of Untaxed Income	2003 Total Amount
Social Security benefits for all family members (Please attach supporting documentation.)	
Child support received for all children	
Aid to Families with Dependent Children (AFDC or ADC) (Please attach supporting documentation.)	
IRA Deductions & payments to self-employment SEP, SIMPLE, Keogh & other qualified plans from IRS form 1040- total of lines 24 + 30 or 1040A-line 17	
Payment to tax-deferred pension and saving plans (paid directly or withheld from earnings) as reported on the W2 form in boxes 12a through 12d, codes D,E,F,G,H,& S. Include untaxed portions of 401 (k) and 403 (b) plans.	
Earned Income Credit (IRS form 1040-line 63 or 1040a-line 41 or 1040EZ-line 8 or Telefile-line L)	
Housing, food, and other living allowances (excluding rent subsidies for low- income housing) paid to members of the military, clergy, and others (Include cash payments and cash value of benefits.)	
Untaxed portions of pensions and IRA distributions from IRS form 1040 lines (15a minus 15b) + (16a minus 16b) or 1040A lines (11a minus 11b) + (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	
Foreign income exclusion (IRS form 2555-line 43 or 2555EZ-line 18)	
Credit for federal tax on special fuels (IRS form 4136 - line 10 - non farmers only)	
Tax exempt interest from tax return (IRS form 1040-line 8b or 1040A - line 8b)	
Other (Please explain and attach supporting documentation.)	

My parents did not receive any non-taxable income or benefits in 2003.

E. PLEASE ATTACH A DETAILED EXPLANATION OF ANY SPECIAL CIRCUMSTANCES.~~~~~

F. CERTIFICATION~~~~~

In order to be eligible for NYS TAP and state and University grants and scholarships

- Students must maintain full-time status (12 credit hours).
- Students must maintain satisfactory academic progress as defined by the University.
- NYS TAP Disbursement requires official declaration of major with the College by the beginning of their junior year.

We understand that by signing this Verification Statement, all information reported in support of this application for financial assistance is complete and correct. The student and at least one parent must sign below.

Student's Signature

Date

Parent Signature(s)

Date

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Filing the FAFSA, the Verification Statement, federal income tax returns and all W2 forms by **April 15, 2004** will ensure priority consideration for all University aid and federal programs. Anyone whose file is incomplete after this date will jeopardize their consideration for University, state and federal funds.