



State Grant and Special Programs  
1200 North Seventh Street, Harrisburg, PA 17102-1444

**OCTOBER VERIFICATION FORM  
(INDEPENDENT STUDENT)**

(NOTE: Deadline for returning this form to PHEAA is April 1, 2009.)

\_\_\_\_\_   
 Print Student's Name

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Student's Social Security Number

OR

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Student's Account Number

2008-09

Complete the sections below, have the appropriate person(s) sign the form, and return the form to PHEAA, P.O. Box 8141, Harrisburg, Pennsylvania 17105-8141 within 30 days. Do not leave any of the questions blank, IF NONE, ENTER ZEROS. Failure to complete the form in its entirety will result in the form being returned for completion. DO NOT PROVIDE WEEKLY OR MONTHLY AMOUNTS, ONLY YEARLY TOTALS.

- Enter the total gross taxed income (prior to deductions, adjustments or exemptions) you and your spouse, if married, expect to receive from January 1, 2008 until December 31, 2008, from each of the sources below. Social Security benefits and railroad retirement benefits are considered untaxed income for purposes of this form and should be included in Section 2.

	<u>Student's Yearly Taxed Income</u>	<u>Spouse's Yearly Taxed Income</u>
a. Wages, salaries, tips	\$ _____	\$ _____
b. Severance pay	\$ _____	\$ _____
c. Pensions, annuities and/or IRA distributions	\$ _____	\$ _____
d. Interest and dividend income	\$ _____	\$ _____
e. Business or farm income	\$ _____	\$ _____
f. Capital gains	\$ _____	\$ _____
g. Income from rents received after expenses paid for mortgage interest, taxes, and insurance	\$ _____	\$ _____
h. Alimony which will be received	\$ _____	\$ _____
i. Unemployment Compensation (State and/or SUB)	\$ _____	\$ _____
j. Any other taxed income	\$ _____	\$ _____
<b>Total 2008 Gross Taxed Income</b>	<b>\$ _____</b>	<b>\$ _____</b>

- Enter the total amount of untaxed income you and your spouse, if married, expect to receive from January 1, 2008 until December 31, 2008, from each of the sources below. Do not include any income reported in Section 1 above.

	<u>Student's Yearly Untaxed Income</u>	<u>Spouse's Yearly Untaxed Income</u>
a. Any contributions to tax-deferred pension and savings plans (paid directly or withheld from earnings). Include untaxed portion of 401(k) and 403(b) plans.	\$ _____	\$ _____

	<u>Student's Yearly Untaxed Income</u>	<u>Spouse's Yearly Untaxed Income</u>
b. Social Security benefits (SSI or disability) received by/for the student, dependent children, and spouse, if married.	\$ _____	\$ _____
c. Retirement or disability benefits	\$ _____	\$ _____
d. Workers' compensation	\$ _____	\$ _____
e. Welfare benefits including TANF (excluding food stamps or subsidized housing)		
f. Untaxed portion of pensions	\$ _____	\$ _____
g. Housing, food, and other living allowances for clergy, military, and others (include cash payment or cash value of benefits)	\$ _____	\$ _____
h. Child support or maintenance payments which will be received for ALL OTHER FAMILY MEMBERS (include cash support of money paid on family's behalf from a non-custodial parent; include assistance with college expenses, payment of bills such as mortgage/rent, car payments, living expenses, etc.; (exclude foster care or adoption payments).	\$ _____	\$ _____
i. Veterans' noneducation benefits, and VA educational work-study allowances	\$ _____	\$ _____
j. Railroad retirement benefits	\$ _____	\$ _____
k. Earned Income Credit	\$ _____	\$ _____
l. Any other untaxed income and benefits such as Black Lung Benefits, Refugee Assistance, nontaxable combat pay, etc.	\$ _____	\$ _____
<b>Total 2008 Untaxed Income</b>	<b>\$ _____</b>	<b>\$ _____</b>

3. If the revised 2008 gross taxed income estimate is higher than or less than the initial 2008 gross taxed income estimate, provide an explanation for the difference. Include date(s) of change in employment status and the date(s) of receipt of additional income or of the loss of income.

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4. If the revised 2008 untaxed income estimate is higher than or less than the initial 2008 untaxed income estimate, provide an explanation for the difference. Include date(s) of change in employment status and the date(s) of receipt of additional income or of the loss of income.

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The Agency will verify the accuracy of the financial data submitted on this form. If this review discloses a substantial discrepancy between the estimated and actual 2008 income, the Agency will seek repayment of any Pennsylvania State Grant funds for which you were not entitled.

**THE PENALTY FOR SUBMISSION OF FRAUDULENT INFORMATION ON THIS FORM MAY BE REPAYMENT OF TRIPLE ANY AMOUNT OF MONEY RECEIVED PLUS A FINE AND/OR IMPRISONMENT.**

\_\_\_\_\_  
Signature of Student

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Spouse (if married)

\_\_\_\_\_  
Date