



State Grant and Special Programs
Phone: 1-800-692-7392 Fax: 717-720-3786

2009-10 INCOME VALIDATION FORM

(NOTE: Deadline for returning this form and the 2008 tax documents to PHEAA is April 1, 2010.)

Print Student's Name

Grid for Student's Social Security Number

Student's Social Security Number

OR

Grid for Student's Account Number

Student's Account Number

2009-10

Dear Student:

PHEAA needs to verify your family's income because you reported on your 2009-10 State Grant application that a U.S. Income Tax Return had not yet been filed with IRS. Please carefully review this request and return the requested information with this letter, which aids in the immediate identification of your application.

If there are other members of your family attending college during the 2009-10 academic year and they have applied for Pennsylvania State Grant aid, list their social security number(s) or account number(s) here.

PHEAA REQUIRES A COMPLETE COPY OF YOUR PARENT(S)' OR IF CONSIDERED AN INDEPENDENT STUDENT, YOUR (AND YOUR SPOUSE'S, IF MARRIED) 2008 U.S. INCOME TAX RETURN AS FILED WITH IRS, INCLUDING ALL 2008 WAGE AND TAX STATEMENTS (W-2 FORMS) AND ALL SUPPORTING FORMS AND SCHEDULES.

IF YOUR PARENT(S) OR YOU (AND/OR YOUR SPOUSE, IF MARRIED) HAVE AN INTEREST IN A CORPORATION AND/OR PARTNERSHIP YOU ALSO NEED TO SUBMIT COPIES OF THE MOST RECENT U.S. PARTNERSHIP AND/OR CORPORATION TAX RETURN(S), INCLUDING THE COMPLETED BALANCE SHEET(S) AND K-1 SCHEDULE(S).

PHEAA requests that you submit a signed copy (as filed with IRS) of your parent(s)' or if considered by PHEAA as an independent student, your (and your spouse's, if married) 2008 U.S. Income Tax Return (IRS Form 1040, 1040A or 1040EZ and 1040X, if applicable) and legible copies of all 2008 Wage and Tax Statements (W-2 Forms).



If an IRS Form 1040 is submitted, you should include copies of all supporting forms and schedules (i.e. Form 6252, Schedules B, C, D, SE, E, etc.). It should be noted that Form 8453 (U.S. Individual Income Tax Declaration for an IRS e-file return) CANNOT be used as a substitute for the complete 2008 U.S. Income Tax Return. If you did not keep a copy of the 2008 U.S. Income Tax Return (IRS Form 1040, 1040A or 1040EZ and 1040X, if applicable), a copy should be requested from the tax preparer, and if not available, then directly from the Internal Revenue Service. In that case, please notify PHEAA that the tax return has been requested. You may have already submitted tax documents to your school, but PHEAA requires copies as well.

At this time, PHEAA has discontinued further processing of your application pending receipt of the requested information. Once your response is received, it will take at least 30 days to review. Therefore, information will not be available until that time. To stay current with any future changes regarding your eligibility, please regularly check your record through PHEAA's Secure Sign-In at www.pheaa.org. If you fail to respond to this request and no State Grant funds have already been disbursed on your behalf, PHEAA will take no further action in regard to this request, or if the financial information submitted on your application proves to be inaccurate, PHEAA will request repayment of any overaward which you may have received.

THIS LETTER AND ALL OF THE REQUESTED DOCUMENTATION MUST BE RETURNED TO PHEAA, P.O. BOX 8141, HARRISBURG, PA 17105-8141 AS SOON AS POSSIBLE (BUT NO LATER THAN APRIL 1, 2010).

PHEAA staff is available to answer your questions at 1-800-692-7392 (TDD for hearing impaired ONLY: 717-720-2366). When calling, please be prepared to provide either your account number or your social security number.

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