# 2019-2020 Independent Verification Worksheet

Your 2019-2020 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. In this process, the school will be comparing information from your application with you and your spouse's 2017 Federal tax transcripts, wage and income transcript or other financial documents. If there are differences your FAFSA information may need to be corrected. You and your spouse whose information was reported on the FAFSA must complete this institutional verification document, attach any required documents, and submit the form and other required documents to the Financial Aid office. We may ask for additional information if necessary. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

## A. Student's Information

________________________________________
Last Name First Name M.I.

________________________________________
Social Security Number / Student ID Number (D number)

________________________________________
Address

________________________________________
Date of Birth

________________________________________
City State Zip Code

________________________________________
Email Address

________________________________________
Student's Home Phone Number (include area code)

________________________________________
Student's Alternate or Cell Phone Number

## B. Independent Student's Family Information

***List below the people in the student's household. Household includes:***

- ***The Student***
- ***The student's spouse, if the student is married.***
- ***The student's or spouse's children if the student or spouse will provide more than half of their support from July 1, 2019 through June 30, 2020***

Indicate in the space provided any household member who will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2019 and June 30, 2020. Include the name of the college.

| Full Name | Age | Relationship | College |
|---|---|---|---|
| | | ***SELF*** | J.F. Drake State Community & Technical College |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

**Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.**

## C. Independent Student's Income Information

**You will only fill out either #1 or #2 of Section C. Please read the instructions carefully.**

Instructions: Complete this section if the student and spouse filed or will file a 2017 IRS income tax return(s). The best way to verify is by using the IRS Data Retrieval Tool (IRS DRT) that is part of the FAFSA on the web at FAFSA.ed.gov.

**1. FILED TAXES -** Important Note: The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate* IRS income tax returns for 2017 or had a change in marital status after the end of the 2017 tax year ending on December 31, 2017.

**Check the box that applies:**

☐ The student has used the IRS DRT in FAFSA on the Web to transfer 2017 IRS income tax return information into the student's FAFSA.

☐ The student is unable or chooses not to use the IRS DRT in FAFSA on the Web, and instead will provide the institution a 2017 Tax Return Transcript(s). This document must be obtained from the IRS agency. See instructions below.

*If the student and spouse filed separate 2017 IRS income tax returns, 2017 IRS Tax Return Transcripts must be provided for both.

A 2017 IRS Tax Return Transcript may be obtained through:

- Get Transcript ONLINE – Go to www.irs.gov , under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "**IRS Tax Return Transcript**" and NOT the "IRS Tax Account Transcript."
- Get Transcript by MAIL – Online request – Go to www.irs.gov, under the Tools heading on the IRS homepage, click "Get a Tax Transcript." Make sure to request the "**IRS Tax Return Transcript**" and NOT the "IRS Tax Account Transcript."
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

**2. DID NOT FILE TAXES -** Important Note: The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate* IRS income tax returns for 2017 or had a change in marital status after the end of the 2017 tax year ending on December 31, 2017. **A NON-FILERS TAX RETURN TRANSCRIPT AND WAGE AND INCOME TRANSCRIPT WILL BE REQUIRED FROM THE IRS.**

**Check the box that applies:**

☐ The student and/or spouse were not employed and had no income earned from work in 2017.

☐ The student and/or spouse were employed in 2017 and have listed below the names of all employers, the amount earned from each employer in 2017, and whether an IRS W-2 form is provided. **(If employers are listed and provided W2s - a WAGE AND INCOME TRANSCRIPT WILL BE REQUIRED.)** See above instructions and select wage and income transcript.)
Note: If additional space is needed, provide a separate page with the student's name and ID number at the top.

| Employer's Name | 2017 Amount Earned | IRS W-2 Provided by employer? |
|---|---|---|
| Suzy's Auto Body Shop (example) | $2,000.00 | Yes |
| | | |
| | | |
| | | |
| | | |
| | Total Amount of income earned from work. | $ |

## D. Verification of Other Untaxed Income for 2017

If any item does not apply, enter "N/A" for Not Applicable where a response is requested, or enter 0 in an area where an amount is requested.

To determine the correct annual amount for each item: If you paid or received the same dollar amount every month in 2017, multiply that amount by the number of months in 2017 you paid or received it. If you did not pay or receive the same amount each month in 2017, add together the amounts you paid or received each month.

**1. Payments to tax-deferred pension and retirement savings.**

List any payments (direct or withheld from earnings) to tax-deferred pension and retirement savings plans (e.g 401(k) or 403(b) plans), including but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d with codes D, E, F, G, H, and S.

| Name of Person who made the payment | Total Amount Paid in 2017 |
|---|---|
| | |
| | |
| | |
| *Total Payments to Tax-deferred Pension and Retirement Savings:* | $ |

**2. Housing, Food, and other living allowances paid to members of the military, clergy and others**

Include cash payments and/or the cash value of benefits received.

**Do not include** the value of on-base military housing or the value of a basic military allowance for housing.

| Name of Recipient | Type of Benefit Received | Amount of Benefit Received in 2017 |
|---|---|---|
| | | |
| | | |
| | *Total Amount of Benefits Received:* | $ |

**3. Veterans non-educational benefits**

List the total amount of veteran's non-education benefit received in 2017. Include disability, Death pension, dependency and Indemnity Compensation (DIC), and/or VA Educational Work study allowances.

**Do not include** federal veterans' educational benefits such as: Montgomery GI Bill, Dependents Education Assistance Program or Post 9/11 GI Bill.

| Name of Recipient | Type of Veterans Non-education benefit | Amount of Benefit Received in 2017 |
|---|---|---|
| | | |
| | | |
| | *Total Amount of Benefits Received:* | $ |

**4. Other untaxed income**

List the amount of other untaxed income not reported and not included elsewhere on this form. Include untaxed income such as workers' compensation, disability, black lung benefits, untaxed portions of health saving accounts from IRS for 1040 Line 25, railroad retirement benefits, etc.

| Name of Recipient | Type of Other Untaxed Income | Amount of Benefit Received in 2017 |
|---|---|---|
| | | |
| | | |
| | *Total Amount of Benefits Received:* | $ |

**5. Money received or paid on the student's behalf**

List any money received or paid on the student's behalf (e.g., payment for student's bills) and not reported elsewhere on this form. Enter the total amount of cash support the student received in 2017. Include support from a parent whose information was not reported. For example, if someone is paying rent, utility bills, etc., for the student or gives cash, gift cards etc., include the amount of that person's contributions unless the person is reported on the 2019-2020 FAFSA as a parent or dependent of the student. Amounts paid on the student's behalf also include any distributions to the student from a 529 plan owned by someone other than the student such as parents, grandparents, aunts and uncles of the student.

| Purpose: e.g., Cash, Rent, Books | Source (person or agency) | Amount Received in 2017 |
|---|---|---|
| | | |
| | | |
| | *Total Amount Received:* | $ |

## E. Certification and Signature

Each person signing below certifies that all of the information reported is complete and correct. **WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

_________________________________________ _________________________________________

Student Name (Print) Student ID Number (D number)

_________________________________________ _________________________________________

Student Signature (Required) Date

_________________________________________ _________________________________________

Spouse Signature (Optional) Date

*Do not mail this worksheet to the U.S. Department of Education. Submit this worksheet to the financial aid administrator at your school. You should make a copy of this worksheet for your records.*

DRAKE STATE
COMMUNITY & TECHNICAL COLLEGE

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