

2016-2017 Independent Verification Worksheet

Last Name	First Name	M.I.	Union ID/SSN
Address			Date of birth
City	State	Zip	() Phone number

PART 1. Household Information

Please list:

1. **Yourself.**
2. **Your spouse**, if you have one.
3. **Your dependent children.** List only those who will receive more than half of their support from you for the period of July 1, 2016 to June 30, 2017. Note: Children for whom you provide child support should not be listed here, but reported in part 5.
4. Other people if they now live with you and you will provide more than half their support from July 1, 2016 to June 30, 2017.

Full Name	Age	Relationship to Student	Name of College (Attending at least half-time during 2016-17)	Graduate Student Y/N
		Self	Union College	No

If you need more space, attach a separate page and check this box

PART 2. Student's 2015 Tax and Income Information - Unmarried Student

Note: Any student who filed or will file an amended return will need to submit an official Tax Return Transcript, a signed copy of the 1040X and all W-2(s) by May 6, 2016.

Did you file a 2015 IRS tax return?

YES	<input type="checkbox"/> 1. I utilized, or will utilize, the FAFSA IRS Data Retrieval Tool. All W-2s are attached or have been previously submitted.
	<input type="checkbox"/> 2. The FAFSA IRS Data Retrieval Tool could not be utilized. My official IRS Tax Return Transcript and corresponding W-2s are attached or will be submitted by the May 6, 2016 deadline. Any untaxed income is listed below.
NO	<input type="checkbox"/> 1. I was not employed and had no income from work during the 2015 tax year.
	<input type="checkbox"/> 2. I was employed and all W-2s are attached or have been previously submitted. Any employers who did not issue a W-2 are listed below.

Employer's Name	2015 Amount Earned

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Last Name _____
First Name _____
M.I. _____
Union ID/SSN _____

PART 3. Student's 2015 Tax and Income Information - Married Student

3A. Tax Return Filers: Select Option 1, 2 or 3 (Non-filers, skip to 3B)

Important Notes:

- ▶ **If you are married, but FILE SEPARATELY:** Both you and your spouse must submit an official IRS Tax Return Transcript.
- ▶ **If you filed, or will file, an AMENDED return:** Submit official IRS Tax Return Transcript and a signed copy of the 1040X.
- ▶ **If you have had a change in marital status after Dec 31, 2015:** Submit an official IRS Tax Return Transcript.

Option 1	FAFSA IRS Data Retrieval Tool (DRT) users (select one of the following): <input type="checkbox"/> A. The DRT was utilized. All W-2s are attached or have been previously submitted. Any untaxed income is listed below. <input type="checkbox"/> B. The DRT will be utilized by the May 6, 2016 deadline. All W-2s are attached or have been previously submitted. Any untaxed income is listed below.
Option 2	Student submitting official IRS Tax Return Transcript(s) (select one of the following): <input type="checkbox"/> A. The transcript and all W-2s are attached or have been previously submitted. Any untaxed income is listed below. <input type="checkbox"/> B. The transcript has been ordered and will be submitted by the May 6, 2016 deadline. All W-2s are attached or have been previously submitted. Any untaxed income is listed below.
Option 3	Student who was granted a filing extension by the IRS: Documentation of the extension (IRS Form 4868) and all W-2s are attached or have been previously submitted. Any untaxed income is listed below. After taxes have been filed, we will (select one of the following): <input type="checkbox"/> Submit an official IRS Tax Return Transcript <input type="checkbox"/> Utilize the FAFSA IRS Data Retrieval Tool The Financial Aid Office can expect the above to be completed by this date: _____

3B. Tax Return Non-Filers

The student and spouse did not, and were not required to, file a tax return with the IRS (select one of the following):

- | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> All 2015 W-2s are attached or have been previously submitted. Any untaxed income is listed below. <i>Note: Employers who did not issue a W-2 should be listed.</i> | <input type="checkbox"/> The student & spouse did not receive any W-2s or earn income from work in 2015. Any untaxed income is listed below. |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|

PART 4. Untaxed Income

Sources of Untaxed Income	2015 Amount	Sources of Untaxed Income	2015 Amount
a. Food Stamps/SNAP* (for 2014 and/or 2015 calendar years)		d. Untaxed Pensions	
b. Child Support Received		e.	
c. Workman's Compensation		f.	

* In certain situations we may require documentation from the agency that issues the Food Stamps benefit.

PART 5. Child Support You Have Paid (NOTE: Child support payments you received should be listed above)

Name of Person Who Paid Child Support	Name of Person to Whom Child Support Was Paid	Name and Age of Child for Whom Support Was Paid	Amount of Child Support Paid in 2015

**In certain situations we may require the following: (a) a copy of your separation agreement or divorce decree that shows the amount of child support to be provided; (b) a statement from the individual receiving the child support showing the amount provided; or (c) copies of the child support checks or money order receipts.

PART 6. Signatures

Each person signing this form certifies that all the information reported on it is complete and correct. Both the student and spouse must sign and date.

Student _____	Date _____
Spouse _____	Date _____