

## 2017-2018 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, 2017 to June 30, 2018. Note: Children for whom you provide child support should not be listed here.
4. Other people if they now live with you and you will provide more than half their support from July 1, 2017 to June 30, 2018.

Full Name	Age	Relationship to Student	Name of College <small>(Attending at least half-time during 2017-18)</small>	Graduate Student Y/N
		Self	Union College	No

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

### PART 2. Unmarried Student's 2015 Tax and Income Information (Married student, skip to Part 3)

#### Did you file a 2015 IRS tax return?

YES, I filed a return	<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-2(s) are attached or will be submitted by the April 17, 2017 deadline.
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If you were required to file an amended tax return, you will need to submit an official Tax Return Transcript, a signed copy of the 1040X and all W-2(s) by April 17, 2017.

NO, I did not file a return	<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.
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**Important: All non-filers are required to provide a Verification of Nonfiling from the IRS.** You can obtain the Verification of Nonfiling by completing IRS Form 4506-T located on IRS website. Once you receive the Verification of Nonfiling from the IRS, you must forward it to our office by the April 17, 2017 deadline.

Employer's Name	2015 Amount Earned

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\_\_\_\_\_  
Last Name

\_\_\_\_\_  
First Name

\_\_\_\_\_  
M.I.

\_\_\_\_\_  
Union ID/SSN

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

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

**Important Notes:**

- ▶ If you are married, but FILED SEPARATELY, both you and your spouse must submit an official IRS Tax Return Transcript.
- ▶ If you filed an AMENDED return, submit official IRS Tax Return Transcript and a signed copy of the 1040X.
- ▶ If you had a change in marital status after Dec 31, 2015, submit an official IRS Tax Return Transcript.
- ▶ If you filed taxes using a Tax ID number, submit the official IRS Tax Return Transcript.

<b>Option 1</b>	<p><b>FAFSA IRS Data Retrieval Tool (DRT) users, select one of the following:</b></p> <p><input type="checkbox"/> A. The DRT was utilized. All W-2s are attached or have been previously submitted.</p> <p><input type="checkbox"/> B. The DRT will be utilized by the April 17, 2017 deadline. All W-2s are attached or have been previously submitted.</p>
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<b>Option 2</b>	<p><b>Student submitting official IRS Tax Return Transcript(s)</b></p> <p><input type="checkbox"/> A. The transcript and all W-2s are attached or have been previously submitted.</p>
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### 3B. Tax Return Non-Filers

**Student and spouses who did not, and were not required to, file a tax return with the IRS must submit a Verification of Nonfiling from the IRS.** You can obtain the Verification of Nonfiling by completing IRS Form 4506-T located on IRS website. Note: If neither the student nor the spouse filed, both must complete Form 4506-T. Once you receive the Verification of Nonfiling from the IRS, you must forward it to our office by the April 17, 2017 deadline. Additionally, please select one of the following options:

- All 2015 W-2s are attached or have been previously submitted.
- Any untaxed income is listed in Part 4. *Note: Employers who did not issue a W-2 should be listed in Part 4.*
- The student & spouse did not receive any W-2s or earn income from work in 2015. Any untaxed income is listed in Part 4.

## PART 4. Untaxed Income

When applicable, add any additional sources of untaxed income and corresponding dollar amount

Sources of Untaxed Income	2015 Amount	Sources of Untaxed Income	2015 Amount
a. Child Support You Received		e. Health Savings Account (IRS Form 1040, line 25)	
b. Disability Payments		f. Tax-Deferred Pension (W-2 forms boxes 12a-12d, codes D, E, F, G, H & S)	
c. Workers' Compensation		g.	
d. Untaxed Pensions		h.	

## PART 5. 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