

2018-2019 Independent Verification Worksheet

Last Name	First Name	M.I.	Union ID or 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, 2018 to June 30, 2019. 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, 2018 to June 30, 2019.

Full Name	Age	Relationship to Student	Name of College (Attending at least half-time during 2018-19)	Graduate Student Y/N
		Self	Union College	No
If you need more space, attach a separate page and check this box <input type="checkbox"/>				

PART 2. Unmarried Student's 2016 Tax and Income Information (Married student, skip to Part 3)

Did you file a 2016 IRS tax return?

YES, I filed a return	<input type="checkbox"/> <input type="checkbox"/>	<p>1. I utilized, or will utilize, the FAFSA IRS Data Retrieval Tool. All W-2s are attached or have been previously submitted.</p> <p>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 16, 2018 deadline.</p>
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If you were required to file an amended tax return, you will need to submit an official Tax **Account** Transcript (NOT the Tax *Return* Transcript), a signed copy of the 1040X and all W-2(s) by April 16, 2018.

NO, I did not file a return	<input type="checkbox"/> <input type="checkbox"/>	<p>1. I was not employed and had no income from work during the 2016 tax year.</p> <p>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.</p>
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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 16, 2018 deadline.

Employer's Name	2015 Amount Earned

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Last Name
First Name
M.I.
Union ID or SSN

PART 3. Married Student's 2016 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 Account Transcript (NOT the Tax Return Transcript) and a signed copy of federal form 1040X.
- ▶ If you had a change in marital status after Dec 31, 2016, submit an official IRS Tax Return Transcript.
- ▶ If you filed taxes using a Tax ID number, submit the official IRS Tax Return Transcript.

Option 1	<p>FAFSA IRS Data Retrieval Tool (DRT) users, select one of the following:</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 16, 2018 deadline. All W-2s are attached or have been previously submitted.</p>
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Option 2	<p>Student submitting official IRS Tax Return Transcript(s)</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 16, 2018 deadline. Additionally, please select one of the following options:

- All 2016 W-2s are attached or have been previously submitted.
 The student & spouse did not receive any W-2s or earn income from work in 2016. Any untaxed income is listed in Part 4.
- Any untaxed income is listed in Part 4. *Note : Employers who did not issue a W-2 should be 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	2016 Amount	Sources of Untaxed Income	2016 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