

## 2020/21 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 – Carefully follow instructions below

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, 2020 to June 30, 2021. Note: Children for whom you provide child support should not be listed here.
4. **Other people** if they live with you and you will provide more than half of their support from July 1, 2020 to June 30, 2021.

Full Name	Age	Relationship to Student (see instructions above)	Name of College (List <b>only</b> if attending at least half-time during 2020/21)	2020/21 Status (List “undergraduate”, “graduate student”, or “not in college”)
		Self	Union College	Undergraduate

If you need more space, attach a separate page and initial here:

### Student 2018 Tax & Income Information. If unmarried, complete Part 2. If married, skip to Part 3.

#### Part 2. Unmarried Student - Did you file a 2018 tax return?

**YES, I filed a return.** Select one of the following:

- \_\_\_\_\_ 1. I utilized the FAFSA IRS Data Retrieval Tool. All W-2(s) are attached or have been previously submitted.
- \_\_\_\_\_ 2. The FAFSA IRS Data Retrieval Tool could not be utilized. My signed federal tax return and corresponding W-2(s) are attached or have been previously submitted.

**Note: If you were required to file an amended tax return**, you must submit a signed copy of the original return filed and a signed copy of your IRS Form 1040X.

**NO, I did not file a return.** Select one of the following:

- \_\_\_\_\_ 1. I was not employed and had no income from work during the 2018 tax year.
- \_\_\_\_\_ 2. I was employed and all W-2(s) are attached or have been previously submitted. Any employers who did not issue a W-2 are listed below.

Employer’s Name (List only those who did not issue a W-2 form)	2018 Amount Earned

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

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

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

\_\_\_\_\_  
Union ID or SSN

### Part 3. Married Student's 2018 Tax and Income Information

#### Part 3A to be completed by tax filers, Part 3B to be completed by non-filers

#### 3A. Tax Return Filers

Important Notes:

- **If you are married, but FILED SEPARATELY**, both you and your spouse need to submit your signed federal tax returns.
- **If you filed an AMENDED return**, submit signed federal tax return and a signed copy of IRS Form 1040X.
- **If you had a change in marital status after Dec 31, 2018**, submit signed federal tax return.
- **If you file using a Tax ID number**, submit signed federal tax return.

In addition to utilizing the FAFSA IRS Data Retrieval Tool and/or submitting signed federal tax returns, please select from the appropriate option(s) below:

- \_\_\_\_\_ 1. W-2/1099 Forms are attached, were previously submitted, or will be submitted by April 1, 2020.
- \_\_\_\_\_ 2. No W-2 Forms received in 2018. If applicable, select one of the following:
- \_\_\_\_\_ a. IRS Form 1040, Schedule C is attached, was previously submitted, or will be submitted by April 1, 2020.
- \_\_\_\_\_ b. IRS Form 1065, Schedule K-1 is attached, was previously submitted, or will be submitted by April 1, 2020.

#### 3B. Tax Return Non-Filers

**Student and spouse who did not, and were not required to, file a tax return with the IRS must both submit a Verification of Nonfiling.** You can obtain the Verification of Nonfiling by both student and spouse completing IRS Form 4506-T located on the IRS website. Once you receive the Verification of Nonfiling from the IRS, you must forward it to our office by the April 1, 2020 deadline. Additionally, please select one of the following options:

- \_\_\_\_\_ 1. All 2018 W-2(s) are attached or have been previously submitted.  
Note: Employers who did not issue a W-2 should be listed in Part 4.
- \_\_\_\_\_ 2. The student and the spouse did not receive any W-2s or earn income from work in 2018. 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	2018 Amount	Sources of Untaxed Income	2018 Amount
a. Child Support You Received		e. Health Savings Account (Form 1040, Schedule 1 line 25)	
b. Disability Payments			
c. Workers' Compensation		g.	
d. Untaxed Pensions		h.	

### Part 5. Certifications and Signatures

Each person signing below certifies that all of the information reported is complete and accurate. Both the student and spouse, when applicable, must sign and date. **ORIGINAL SIGNATURES ONLY**, E-signatures are not accepted.

\_\_\_\_\_  
Student

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse

\_\_\_\_\_  
Date