

2021/22 Dependent Verification Worksheet

| | | | |
|-----------|------------|------|---------------|
| Last Name | First Name | M.I. | Union ID |
| Address | | | Date of Birth |
| City | State | Zip | Phone Number |

Part 1. Household Information – Carefully follow instructions below

Please list:

1. **Yourself**
2. **Your parent(s).** In cases of separation/divorce, list the parent with whom you lived more during the past 12 months. If this parent is remarried, you must include your stepparent.
3. **Your siblings/other dependent children** if your parents will provide more than half of their support from July 1, 2021 to June 30, 2022, even if a child does not live with your parents.
4. **Other people** if they now live with and will receive more than half of their support from your parents through June 30, 2022.

| Full Name | Age | Relationship to Student (see instructions above) | Name of College (List only if attending at least half-time during 2021/22) | 2021/22 Status (List “undergraduate”, “graduate student”, or “not in college”) |
|-----------|-----|---|--|---|
| | | Self | Union College | Undergraduate |
| | | | | |
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If you need more space, attach a separate page and initial here:

Part 2. Student 2019 Tax and Income Information – Did you file a 2019 tax return? (Yes or No)

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 return, you must submit a signed copy of the original tax 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 2019 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) | 2019 Amount Earned |
|--|--------------------|
| | |
| | |

Last Name

First Name

M.I.

Union ID or SSN

Part 3. Parent 2019 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 parents are married, but FILED SEPARATELY, each parent needs to submit their signed federal tax return.
- If parents filed an AMENDED return, submit signed federal tax return and a signed copy of IRS Form 1040X.
- If parents had a change in marital status after Dec 31, 2019, submit signed federal tax return.
- If parents filed using Tax ID numbers, 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. Parent W-2/1099 Forms are attached, were previously submitted, or will be submitted by April 1, 2021.
- _____ 2. No W-2 Forms received in 2019. If applicable, select one of the following:
- _____ a. 2019 IRS Form 1040, Schedule C is attached, was previously submitted, or will be submitted by April 1, 2021.
- _____ b. 2019 IRS Form 1065, Schedule K-1 is attached, was previously submitted, or will be submitted by April 1, 2021.

3B. Tax Return Non-Filers

Parents who did not and were not required to file a tax return with the IRS must submit a **Verification of Nonfiling**. You can obtain the Verification of Nonfiling by completing IRS Form 4506-T located on the IRS website. NOTE: If neither parent filed, each parent 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 1, 2021 deadline. Additionally, please select one of the following options:

- _____ 1. All 2019 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 parent(s) did not receive any W-2s or earn any income from work in 2019.

Part 4. Untaxed Income

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

| Sources of Untaxed Income | 2019 Amount | Sources of Untaxed Income | 2019 Amount |
|--|-------------|--|-------------|
| a. Child Support You Received | | e. Tax-Deferred Pension Payments(W-2, box 12 codes D, E, F, G, H, S) | |
| b. Disability Payments | | | |
| c. Workers' Compensation | | f. | |
| d. Health Savings Account (Form 1040, Schedule 1, line 12) | | g. | |
| | | h. | |

Part 5. Certifications and Signatures

Each person signing below certifies that all of the information reported is complete and accurate. The student and one parent whose information was reported on the FAFSA must sign and date. **ORIGINAL SIGNATURES ONLY**, E-signatures are not accepted.

Student

Date

Parent

Date