

## 2023/24 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, 2023 to June 30, 2024, 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, 2023.

Relationship to Student (see instructions above)	Full Name	Age	Name of College (List only if attending at least half-time during 2023/24)	2023/24 Status (List “undergraduate”, “graduate student”, or “not in college”)
Union Student			Union College	Undergraduate
Parent 1			Not Applicable	/
Parent 2, if applicable			Not Applicable	/
Sibling/other				
Sibling/other				
Sibling/other				

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

### Part 2. Student 2021 Tax and Income Information–Did you file a 2021 tax return? (Yes or No)

YES, I filed a return

- \_\_\_\_\_ 1. I utilized the FAFSA IRS Data Retrieval Tool. All W-2(s) are attached or have been previously submitted.

*OR*

- \_\_\_\_\_ 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.

NO, I did not file a return

- \_\_\_\_\_ 1. I was not employed and had no income from work during the 2021 tax year.

*OR*

- \_\_\_\_\_ 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)	2021 Amount Earned

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

## Part 3. Parent 2021 Tax and Income Information

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

### 3A. Tax Return Filers

Submit signed federal tax returns, along with all schedules, and corresponding W2 forms *even if the FAFSA IRS Data Retrieval Tool was utilized*. When applicable, the following is also required:

- Form 1065, Schedule K-1
- Corporate or partnership federal income tax return

#### 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, 2021, submit signed federal tax return.
- If parents filed using Tax ID numbers, submit signed federal tax return.

### 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 May 5, 2023 deadline. Additionally, please select one of the following options:

- \_\_\_\_\_ 1. All 2021 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 2021.

## Part 4. Untaxed Income

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

Sources of Untaxed Income	2021 Amount	Sources of Untaxed Income	2021 Amount
a. Child Support You Received		e. Disability Payments	
b. Workers' Compensation		f.	
c. Health Savings Account (Form 1040, Schedule 1, line 13)		g.	
d. Tax-Deferred Pension Payments (W-2, box 12 codes D, E, F, G, H, S)		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