

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

Relationship to Student (see instructions above)	Full Name	Age	Name of College (List only if attending at least half-time during 2023/24)	2023/24Status (List "undergraduate", "graduate student", or "not in college")
Union Student			Union College	Undergraduate
Spouse, if applicable				
Child/other				
Child/other				
Child/other				

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

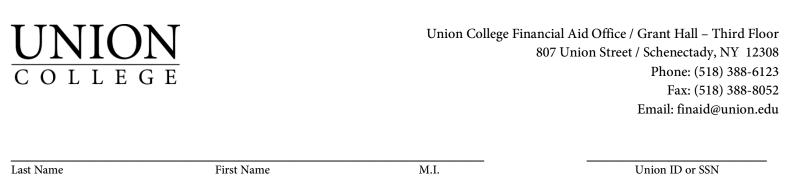
Student 2021 Tax & Income Information: UNMARRIED student: Complete Part 2, then skip to Part 4.

MARRIED student: SI	kip to F	°art 3.
---------------------	----------	---------

Part 2. UNMARRIED student - Did you file a 2021 tax return? (Yes or No)

YES, I filed a return	NO, I did not file a return
1. I utilized the FAFSA IRS Data Retrieval Tool. All W-2(s) are attached or have been previously	1. I was not employed and had no income from work during the 2021 tax year.
submitted.	OR
<i>OR</i> 2. The FAFSA IRS Data Retrieval Tool could not be utilized. My <i>signed</i> federal tax return and corresponding W-2(s) are attached or have been previously submitted.	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



Part 3. MARRIED Student's 2021 Tax and Income Information

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

3A. MARRIED Tax Return Filers

Submit <u>signed</u> 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:

- Figure 1 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.
- Figure 1 If you had a change in marital status after Dec 31, 2021, submit *signed* federal tax return.
- ➢ If you file using a Tax ID number, submit <u>signed</u> federal tax return.

3B. MARRIED 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 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 student and the spouse did not receive any W-2s or earn income from work in 2021. Any untaxed income is listed in Part 4.

Part 4. Untaxed Income – UNMARRIED & MARRIED STUDENT

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. Both the student and spouse, when applicable, must sign and date. ORIGINAL SIGNATURES ONLY, E-signatures are not accepted.

Student

Date