



OFFICE OF FINANCIAL AID

2023-2024 Independent Verification Worksheet

Your application was selected for review in a process called “Verification.” In this process, your school will be comparing information from your FAFSA application with signed copies of you and your spouse(s) (if married) **2021** Federal tax transcripts, W-2 forms or other financial documents. The law says we have the right to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, you or your school may need to make corrections electronically or by using your Student Aid Report (SAR). Complete this verification form and submit it to your financial aid administrator as soon as possible, so that your financial aid won’t be delayed. Your financial aid administrator will help you.

What You Should Do

1. Collect your and your spouse’s financial documents (Federal **2021** IRS Signed Tax Forms or Tax Transcript(s), W-2 forms, etc.)
2. Complete and sign the worksheet.
3. Submit the completed worksheet, tax forms (IRS Signed Taxes or Tax Transcript, W2 Forms), and any other documents your school requests to your Financial Aid Office.
4. Your financial aid administrator will compare information on this worksheet and any supporting documents with the information you submitted on your application. You or your school may need to make corrections electronically or by using your SAR.
5. If you need additional space for any section, please attach a separate sheet.
6. Submit this completed form and all other requested documents to: Financial Aid Office PO Box 1000 Ferrum, VA 24088 or fax to (540) 365-4266

A. Student Information

Last Name	First Name	MI	Student ID#
Address			Date of Birth
City	State	Zip	Phone Number
Student Email Address			Cell Phone #

B. Household Information and Number in College

List below the people in the student’s household. Include:

- The student
- The student’s spouse, if the student is married.
- The student or spouse’s children if the children or spouse will provide more than half of the children’s support from July 1, 2023, through June 30, 2024, even if the children do not live with the student.
- other people if they now live with the student and the student or spouse provides more than half of the other people’s support and will continue to provide more than half of their support through June 30, 2024.

Write the names of all household members in the space(s) below.

Also write in the name of the college for any household member who will be attending at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2023 and June 30, 2024

Full Name	Age	Relationship	College Attending	Enrolled at Least Half-Time (Yes/No)

C. Students 2021 Tax and Income Information

1. Did you or were you required to file a 2021 Federal Income Tax Return?

YES NO

IMPORTANT: For students who DID NOT file or were not required to file a 2021 Federal Income Tax Return, the student MUST provide a Verification of Non-Filing Letter (confirmation that a tax return has not yet been filed) from the IRS or other relevant tax authority, dated on or after October 1, 2021. Students can receive this document by 1. Completing a 4506T-EZ form (available online at www.irs.gov) and checking Box 7 or 2. Go to www.irs.gov, under the Tools heading, click “Get Transcript Online” or “Get Transcript by Mail.” Make sure to request the “Verification of Non-Filing Letter.”

If you DID NOT file or were not required to file, please list ANY income you received in 2021 below and from what source the income was from (i.e. odd job, work study, etc.) **Attach copies of ALL Student W2 Forms for 2021.**

Amt Received \$ _____ Source _____ W-2 Provided by Employer? Yes No
Amt Received \$ _____ Source _____ W-2 Provided by Employer? Yes No

If the student WILL FILE a 2021 Federal Income Tax Return, check the box that applies:

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2021 IRS income tax return information into the student’s FAFSA.
 The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2021 IRS income tax return information into the student’s FAFSA.
 The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2021 IRS Tax Return Transcript or signed IRS Tax Return.**

A 2021 IRS Tax Return Transcript may be obtained through:

- Get Transcript by MAIL – Go to <https://www.irs.gov/individuals/get-transcript> and click “Get Transcript by MAIL.” Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.”
- Get Transcript ONLINE – Go to <https://www.irs.gov/individuals/get-transcript> and click “Get Transcript ONLINE.” Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.”
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

D. Spouse’s 2021 Tax and Income Information (if student is married)

Do not duplicate the student’s information above if you are married.

1. Did you or are you required to file a 2021 Federal Income Tax Return?

YES NO

IMPORTANT: For a spouse who DID NOT file or were not required to file a 2021 Federal Income Tax Return, the spouse MUST provide a Verification of Non-Filing Letter (confirmation that a tax return has not yet been filed) from the IRS or other relevant tax authority, dated on or after October 1, 2022. A spouse can receive this document by 1. Completing a 4506T-EZ form (available online at www.irs.gov) and checking Box 7 or 2. Go to www.irs.gov, under the Tools heading, click “Get Transcript Online” or “Get Transcript by Mail.” Make sure to request the “Verification of Non-Filing Letter.”

If your spouse DID NOT file or were not required to file, please list ANY income received in 2021 below and from what source the income was from (i.e. odd job, work study, etc.) **Attach copies of ALL Spouse W2 Forms for 2021.**

Amt Received \$ _____ Source _____ W-2 Provided by Employer? Yes No
Amt Received \$ _____ Source _____ W-2 Provided by Employer? Yes No

If the spouse WILL FILE a 2021 Federal Income Tax Return, check the box that applies:

- The spouse and student have used the IRS DRT in *FAFSA on the Web* to transfer 2021 IRS income tax return information into the student’s FAFSA.
 The spouse and student have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2021 IRS income tax return information into the student’s FAFSA.
 The spouse and student are unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2021 IRS Tax Return Transcript or IRS signed Tax Return.**

A 2021 IRS Tax Return Transcript may be obtained through:

- Get Transcript by MAIL – Go to <https://www.irs.gov/individuals/get-transcript> and click “Get Transcript by MAIL.” Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.”
- Get Transcript ONLINE – Go to <https://www.irs.gov/individuals/get-transcript> and click “Get Transcript ONLINE.” Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.”
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

E. Untaxed Income-Calendar Year 2021

Report annual amounts for 2021. See Page 4 for more information regarding assets etc. **DO NOT LEAVE ANSWERS BLANK. If '0' please enter '0'.**

Student/Spouse

Additional Financial Information

\$ _____ Education credits (American Opportunity Tax Credit and Lifetime Learning tax credits) from IRS Form 1040 Schedule 3-line 3.

\$ _____ Child support paid because of divorce or separation or as a result of a legal requirement. **Don't include** support for children in your household, as reported in question 90.

\$ _____ Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.

\$ _____ Taxable student grant and scholarship aid **reported to the IRS as income.** Includes Americorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.

\$ _____ Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Don't include untaxed combat pay.

\$ _____ Earnings from work under a cooperative education program offered by a college.

Untaxed Income

\$ _____ Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings) including, but not limited to, amounts reported on the W-2 form in Boxes 12a-12d, codes D, E, F, G, H, and S. Don't include amounts reported in code DD (employer contribution toward employee health benefits).

\$ _____ IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans from IRS Form 1040 Schedule 1-total of lines 16+20.

\$ _____ Child support received for any of your children. **Don't include** foster care or adoption payments.

\$ _____ Tax exempt interest income from IRS Form 1040-line 2a.

\$ _____ Untaxed portions of IRA distributions or pensions from IRS Form 1040-lines (4a + 5a) minus lines (4b +5b). If negative, enter zero here.

\$ _____ Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). **Don't include** the value of on-base military housing or the value of a basic military allowance for housing.

\$ _____ Veterans non-education benefits such as Disability, Death Pension, or Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study Allowances.

\$ _____ Other untaxed income not reported in items 44a through 44g, such as worker's compensation, disability benefits, untaxed foreign income, etc. Also include the untaxed portions of health savings accounts from IRS 1040 Schedule 1-line 12. **Don't include** extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.

\$ _____ Money received, or paid on your behalf (e.g. bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement.

F. Sign this Worksheet

Each person signing below certifies that all of the information reported is complete and correct. Warning: If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.

Student Signature: _____ Date: _____

Spouse Signature: _____ Date: _____

Submit this form and all other requested documents to;
Financial Aid Office FAX: (540) 365-4266
P.O. Box 1000
Ferrum, VA 24088,