



Student Financial Services | 715 North Avenue | New Rochelle, NY 10801 | 914.633.2497 | fax 914.885.1065 | sfs@iona.edu | www.iona.edu

### 2017-2018 Independent Verification Worksheet

Any financial aid awarded prior to verification is tentative. Student Financial Services has the right after reviewing your verification information to request additional documentation and to change or cancel your awards. Changes in funding, administrative/technical errors, changes in application information, enrollment status or reclassification in residency will affect your financial aid award and may result in a revised financial aid award. You can monitor your verification status on your PeopleSoft "To Do" List. **All required verification documents must be submitted to and processed by Student Financial Services by July 15, 2017.**

#### A. Independent Student's Information

----- Student's Last Name	----- Student's First Name Student's M.I.
----- Student's ID Number	----- Student's Social Security Number
____/____/____ Student's Date of Birth	----- Student's Email Address
----- Student's Street Address, City, State, Zip Code (include apt. no.) (____)-____-____ (____)-____-____	
----- Student's Home Phone Number	----- Student's Alternate or Cell Phone Number

#### B. Independent Student's Family Information

List the people in your household. Include:

- Yourself
- Your spouse (if married)
- Children if you will provide more than half of their support from July 1, 2017 through June 30, 2018 and indicate if they will attend college for *undergraduate* study in 2017/2018 academic year
- Other people who now live with you, if you will provide more than half of their support from July 1, 2017 through June 30, 2018

*If more space is needed, attach a separate page with the Student's Name and Student ID# at the top.*

Full Name	Age	Relationship	College	Will Be Enrolled At Least Half Time
<i>Example: Amber Lynn Scott</i>	<i>18</i>	<i>Wife</i>	<i>General University</i>	<i>Yes</i>
		Self		

Student's Name: \_\_\_\_\_ ID# \_\_\_\_\_

**Important information regarding tax data and verification:**

▪ *A Federal Tax Return Transcript or a signed copy of the original 1040 (A, EZ) are acceptable for the Federal Verification Process. Please provide either a signed copy of your 1040 (A, EZ), or follow the below instructions to obtain a tax return transcript:*

- ♦ **Get Transcript by Mail** -- Go to [www.irs.gov](http://www.irs.gov), under the Tools heading, click "Get a tax transcript." 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 [www.irs.gov](http://www.irs.gov), under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- ♦ **Telephone Request** - 1--800--908--9946
- ♦ **Paper Request Form** - Use the links to download IRS Form [4506T-EZ](#) or IRS Form [4506-T](#) and submit to the IRS

▪ *When requesting tax return transcripts, use the Social Security Number (or the IRS individual taxpayer identification number) and the date of birth of the first person listed on the 2015 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2015 IRS income tax return). You may be eligible to print your tax return transcript upon account access. If not, your request will be mailed to you in 5-7 business days. **If both student and spouse filed separate 2015 returns, tax return transcript(s) or signed copies of the 1040's (A, EZ) must be provided for both student and spouse.***

**C. Independent Student's Income Information to Be Verified**

*Student 2015 Tax and Income Information:*

The student has attached a 2015 IRS Tax Return Transcript(s) or signed copy of 1040 (A, EZ)

*Student 2015 Non-Filers Section:*

You must complete this section if you did not file and were not required to file a 2015 income tax return with the IRS:

I, \_\_\_\_\_, declare that I did not and was not required to file a tax return for 2015. If employed in 2015, I am listing below any employers and income earned in 2015, as well as providing the associated W2 forms for 2015.

Provide all copies of W2's issued for 2015.

Employer's Name/Unearned Income Source	2015 Amount Earned	Was IRS W-2 Provided Yes/No
<i>Example: Dillon's Food Truck</i>	<i>\$3,013.83</i>	<i>Yes</i>

Student Signature for Non-filers declaration: \_\_\_\_\_ Date: \_\_\_\_\_

Student's Name: \_\_\_\_\_ ID# \_\_\_\_\_

### D. Spouse's Income Information to Be Verified

▪ If the student and spouse filed separate 2015 IRS income tax returns, 2015 IRS Tax Return Transcripts or signed copies of 1040 (A, EZ) must be provided for both student and spouse.

#### Spouse 2015 Tax and Income Information:

The spouse has attached a 2015 IRS Tax Return Transcript(s) or signed copy of 1040 (A, EZ)

#### Spouse 2015 Non-Filers Section:

You must complete this section if you did not file and were not required to file a 2015 income tax return with the IRS:

I, \_\_\_\_\_, declare that I did not and was not required to file a tax return for 2015. If employed in 2015, I am listing below any employers and income earned in 2015, as well as providing the associated W2 forms for 2015.

Provide all copies of W2's issued for 2015.

Employer's Name/Unearned Income Source	2015 Amount Earned	Was IRS W-2 Provided Yes/No
<i>Example: Dillon's Food Truck</i>	<i>\$3,013.83</i>	<i>Yes</i>

Spouse Signature for Non-filers declaration: \_\_\_\_\_ Date: \_\_\_\_\_

### E. Child Support Paid

Did *you or your spouse* pay child support in 2015?

No       Yes (Please certify the following)

Name of Person to Whom *the child support was paid in* 2015: \_\_\_\_\_ Total Paid: \$ \_\_\_\_\_

Name of Child(ren): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*\*If you need additional space, please write on the back of this form*

### F. SNAP Benefits

Complete this section if someone in the student's household received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2014 or 2015 calendar years. If asked by the student's school, I will provide documentation of the receipt of SNAP benefits during 2014 and/or 2015.

- Yes, a household member received SNAP in 2014/2015
- No, none of the household members received SNAP in 2014/2015

Student's Name: \_\_\_\_\_ ID# \_\_\_\_\_

### G. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent must sign and date.

-----  
Student's Signature

-----  
Date

-----  
Spouse's Signature (optional)

-----  
Date

*Submit this worksheet to the financial aid administrator at your school. You should make a copy of this worksheet for your records. WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.*

#### **\*\*Verification of 2015 IRS Income Tax Return Information for Individuals with Unusual Circumstances\*\***

##### ***-Verification of 2015 IRS Income Tax Return Information for Individuals Who Filed an Amended IRS Income Tax Return***

If an individual filed an amended IRS income tax return for tax year 2015, provide both of the following:

- A 2015 IRS Tax Return Transcript for the 2015 tax year; and
- A signed copy of the 2015 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

##### ***--Verification of Non-filers for 2015 IRS Income Tax Return Information***

- Visit [www.irs.gov](http://www.irs.gov) and follow steps to request a tax return transcript for 2015; or
- Complete form 4506-T Request for Tax Return Transcript (available at [www.irs.gov](http://www.irs.gov)) and mail it to the address on the form
- Either option will generate a non-filers letter for tax year requested, provide this letter to SFS

##### ***-Verification of 2015 IRS Income Tax Return Information for Individuals Who Were Victims of IRS Identity Theft***

- A victim of IRS identity theft who is not able to obtain a **2015 IRS Tax Return Transcript** or use the IRS DRT must contact the IRS Identity Protection Specialized Unit at 1- 800-908-4490 to obtain a Tax Return Data Base View of 2015 IRS income tax return information (a TRDBV version transcript.)
- A statement signed and dated by the tax filer indicating that they were victims of IRS tax-related identity theft and that the IRS has been made aware of the tax-related identity theft.

##### ***-Verification of 2015 IRS Income Tax Return Information for Individuals Who Filed Non-IRS Income Tax Returns***

- An individual filed or will file a 2015 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, must provide a signed copy of that 2015 income tax return(s).

**\*\*Other forms are available at [www.iona.edu/onlineforms](http://www.iona.edu/onlineforms)**

**\*\*Other resources:**

Internal Revenue Service: [www.irs.gov](http://www.irs.gov); 1-800-829-1040

FAFSA: [www.fafsa.ed.gov](http://www.fafsa.ed.gov); 1-800-4-FED-AID

Student Financial Services: [www.iona.edu/Student-Life/Student-Financial-Services](http://www.iona.edu/Student-Life/Student-Financial-Services); 914-633-2497; [sfs@iona.edu](mailto:sfs@iona.edu)