



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

**1. TAX RETURN FILERS—Important Note:** If you (or your spouse, if married) filed, or will file, an amended 2015 IRS tax return, you must contact your financial aid administrator before completing this section.

**Instructions:** Complete this section if you, the student, filed or will file a 2015 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student has not already used the tool, go to [FAFSA.gov](http://FAFSA.gov), log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student is eligible to use the IRS Data Retrieval Tool to transfer 2015 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.*

**Check the box that applies:**

- I, the student, have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer my (and, if married, my spouse's) 2015 IRS income information into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *Your school will use the IRS information that was transferred in the verification process.*
- I, the student, have not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to transfer my (and, if married, my spouse's) 2015 IRS income information into my FAFSA once I have filed a 2015 IRS tax return. *See instructions above for information on how to use the IRS Data Retrieval Tool. Your school cannot complete the verification process until the IRS information has been transferred into the FAFSA.*
- I, the student, am unable or choose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and I will submit to the school a **2015 IRS tax return transcript(s)**—not photocopies of the income tax return. *To obtain an IRS tax return transcript, go to [www.irs.gov](http://www.irs.gov) under Tools click on the "Get tax transcript" link, or call 1-800-908-9946. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2015 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.*
- I, the student, am a victim of tax identity theft who is unable to obtain a **2015 IRS Tax Return Transcript** or use the IRS Data Retrieval Tool. The student must contact the IRS at 1-800-908-4490 and upon authentication of the tax filer's identity receive a transcript called TRDBV (Transcript Database View). Document will be submitted to the school once received from IRS.
  - Check here if an IRS tax return transcript(s) is attached to this worksheet.
  - Check here if an IRS tax return transcript(s) will be submitted to your school later. Verification cannot be completed until the IRS tax return transcript has been submitted to your school.

**2. TAX RETURN NONFILERS**—Complete this section if you, the student, (and, if married, your spouse) will not file and are not required to file a 2015 income tax return with the IRS.

**Check the box that applies:**

- The student (and, if married, the student's spouse) was not employed and had no income earned from work in 2015.
- The student (and/or the students spouse if married) was employed in 2015 and has listed below the names of all the employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is attached. Attach copies of all 2015 IRS W-2 forms issued to you ((and, if married, to your spouse) by employers. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Employer's Name	2015 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>

Student's Name: \_\_\_\_\_ SSN: \_\_\_\_\_

**D. Students (and Spouse, if married) 2015 Untaxed Income** – Do not include financial aid, social security benefits, or welfare benefits. Be sure to enter N/A for items that do not apply. Leaving items blank can result in processing delays.

**STUDENT    SPOUSE**

1. Did you or your spouse **receive child support** for family members (listed in Section II) in **2015**?  
(You must circle correct answer.)

YES / NO

If yes, the total amount received in **2015**:  
(Do not include foster care or adoption payments.)

\$ \_\_\_\_\_ \$ \_\_\_\_\_

2. **Housing, food, and other living allowances** paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or the value of a basic military allowance for housing.

\$ \_\_\_\_\_ \$ \_\_\_\_\_

3. **Cash received or any money paid** on your behalf in **2015**:

\$ \_\_\_\_\_ \$ \_\_\_\_\_

4. **2015** Untaxed IRA distribution or pensions/annuities. Check the **2015** tax return for:  
(IRS form 1040: lines (15a minus 15b) + (16a minus 16b) = untaxed portion)  
(IRS form 1040A: lines (11a minus 11b) + (12a minus 12b) = untaxed portion)  
Total untaxed amount received in **2015**:

\$ \_\_\_\_\_ \$ \_\_\_\_\_

**WAS THE ABOVE AMOUNT REINVESTED IN A RETIREMENT ACCOUNT?**

(You must circle correct answer.)

YES / NO

5. **2015 payments to tax-deferred pension and savings plans** (paid directly to or withheld from earnings) such as a 401k and 403b plans. **Check student and parent(s) 2015 W2 forms, box 12a through 12d (Codes D, E, F, G, H, & S).** Total amount received in **2015**:

\$ \_\_\_\_\_ \$ \_\_\_\_\_

6. **Untaxed Veterans' 2015 Benefits:**

A. **2015 Untaxed Non-Educational Veterans' benefits** such as Disability Pension, Death Pension, Dependency & Indemnity Compensation (DIC), etc. Total amount received in 2015

\$ \_\_\_\_\_ \$ \_\_\_\_\_

B. **2015 Untaxed Veteran Administration Education Work-Study Allowances** received in **2015**

\$ \_\_\_\_\_ \$ \_\_\_\_\_

7. **Other 2015 Untaxed Income Not Reported** such as workers' compensation, disability, or first-time home buyer tax credit from IRS Form 1040 line 67.

\$ \_\_\_\_\_ \$ \_\_\_\_\_

**E. Students Other Information to Be Verified**

1. Did the students and or spouse, if married pay child support in 2015? \_\_\_\_\_ Yes \_\_\_\_\_ No

If YES, please complete the following:

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Amount of Child Support Paid in 2015
<i>Marty Jones</i>	<i>Chris Smith (example)</i>	<i>Terry Jones</i>	<i>\$6,000.00</i>


- |   | <u>Student</u> | <u>Spouse</u> |
|---|----------------|---------------|
| 2. <b>Grant, scholarship, fellowship and assistantship aid, including AmeriCorps awards, in excess of tuition, fees, books, and required supplies that was reported in the Adjusted Gross Income (AGI) on the 2015 federal tax return(s)?</b> | \$ _____       | \$ _____      |
| 3. <b>2015 Taxable Earnings from Federal Work-Study</b> or other need-based work programs.<br>Was this income reported on your <b>2015</b> income tax return(s)?<br>_____ Yes    _____ No    The amount was:                                  | \$ _____       | \$ _____      |
| ❖ Please name the college(s) from which this <b>2015</b> taxable income was earned:<br>_____<br>_____   |                |               |
| 4. <b>Combat pay or Special Combat pay.</b> Only enter the amount that was taxable and included in your parents' Adjusted Gross Income (AGI). Please attach all <b>2015</b> W-2 forms.  | \$ _____       | \$ _____      |
| 5. <b>Earnings from work under cooperative education program</b> offered by a school. Please attach all 2014 W-2 forms.   | \$ _____       | \$ _____      |

**F. 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.

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date

***Do not mail this worksheet to the U.S. Department of Education.  
Submit this worksheet to the financial aid administrator at your school.***

***You should make a copy of this worksheet for your records.***