



# 2015-2016 Verification Worksheet/Certifications

## STEP 1: STUDENT INFORMATION

<i>Last Name</i>		<i>First Name</i>		<i>Student ID</i>
<i>Permanent Address</i>		<i>Street</i>	<i>City/State/Zip</i>	<i>Date of Birth</i>
<i>Local Phone Number (Include Area Code)</i>		<i>Permanent Phone Number (Include Area Code)</i>		<i>Email Address</i>

## STEP 2: FAMILY INFORMATION

If you are a **dependent student**, include:

- Yourself
- Your parent(s) (including step-parents)
- Your parent(s) other dependent children if a) your parent(s) will provide more than half of their support from July 1, 2015, through June 30, 2016, or b) the children would be required to provide parental information when applying for Federal Student Aid
- Other people only if they now live in your parent household and your parents will provide more than half of their support from July 1, 2015, through June 30, 2016.

If you are an **independent student**, include:

- Yourself
- Your spouse (if you are married)
- Your children if you will provide more than half of their support from July 1, 2015, through June 30, 2016
- Other people only if they live in your household and you provide more than half of their support and will continue to do so from July 1, 2015, through June 30, 2016

Write the names of all household members in the spaces below. Also write in the name of the college for any member who will be attending college at least half-time between July 1, 2015 and June 30, 2016, and will be enrolled in a degree, diploma or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
		<i>Self</i>	Texas Wesleyan University

## STEP 3: FOOD STAMP BENEFITS – CALENDAR YEAR 2014

Did you receive food stamps during the calendar year 2014?

**YES**...Attach documentation showing that you qualified for the benefit during the calendar year 2013. Continue to STEP 4

**NO**...Continue to STEP 4

**STEP 4: STUDENT TAX TRANSCRIPT & INCOME INFORMATION – CALENDAR YEAR 2014**

Are you or will you be required to file a 2014 Federal Income Tax Return?

- YES...Attach a copy of a Federal Tax Return Transcript from the IRS (not a copy of Federal Tax Return filed), skip ahead to STEP 5. Unless you were able to use the IRS Data Retrieval on your FAFSA
- NO...Complete the table below and attach either a “Student Income Inquiry Form” or copies of ALL 2014 W-2 forms and Continue to STEP 5

Source of Income <i>(Fill out only if you did NOT file taxes)</i>	Amount Earned in 2014
Total	

**NOTE:** We cannot accept a copy of the tax return. To request a *Tax Return Transcript* or a “W-2 Wage Summary” (if you did not keep a copy of your W-2 form); contact the IRS at 800-908-9946 or [www.irs.gov](http://www.irs.gov) . Please be advised that it may take a minimum of three weeks for the IRS to mail these documents to you.

**STEP 5: SPOUSE OR PARENT TAX TRANSCRIPT(S) & INCOME INFORMATION – CALENDAR YEAR 2014**

Are you or will you be required to file a 2014 Federal Income Tax Return?

- YES...Attach a copy of a Federal Tax Return Transcript from the IRS (not a copy of Federal Tax Return), skip ahead to STEP 6. Unless you were able to complete the IRS Retrieval on your FAFSA
- NO...Complete the table below and attach either a “Student (if for spouse) or Parent (if for parent) Low Income Inquiry Form” or copies of ALL 2014 W-2 forms and continue to STEP 6.

Source of Income <i>(Fill out only if you did NOT file taxes)</i>	Amount Earned in 2014
Total	

**NOTE:** We cannot accept a copy of the tax return. To request a *Tax Return Transcript* or a “W-2 Wage Summary” (if you did not keep a copy of your W-2 form); contact the IRS at 800-908-9946 or [www.irs.gov](http://www.irs.gov) . Please be advised that it may take a minimum of three weeks for the IRS to mail these documents to you.

**STEP 6: CHILD SUPPORT PAID – CALENDAR YEAR 2014**

Did you pay child support because of divorce or separation during the calendar year 2014?

(Do not include support for children included in household size in STEP 2)

- YES...Complete the table below and continue to STEP 7.
- NO...Continue to STEP 7

Amount of Child Support Paid	Name of Who Child Support Was Paid To	Name of Child Paying Support For
Total:		



**Step 7: Untaxed Income Information**

**DO NOT LEAVE ANY QUESTIONS BLANK.**

	Student	Parent/Spouse
Payments to tax-deferred pension and savings plans in 2013, including but not limited to amounts reported on the W-2 Form in Boxes 12a through 12d (codes D, E, F, G, H, and S)	\$	\$
Child support received for all children (foster care or adoption fees do not apply)	\$	\$
Housing, food or other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits)	\$	\$
Veterans non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances	\$	\$
Other untaxed income not reported, such as workers' compensation, disability, etc. Also include the first-time homebuyer tax credit from IRS Form 1040—line 67. Don't include student aid, earned income credit, add'l child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act 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	\$	XXXXXXXXXXXXXXXXXXXX

**STEP 8: CERTIFICATION OF HIGH SCHOOL COMPLETION**

I certify that I graduated from high school, received a recognized equivalent of a high school diploma, or a homeschool.

Date of Completion: \_\_\_\_\_

**STEP 9: STATEMENT OF SELECTIVE SERVICE REGISTRATION STATUS (CHECK APPLICABLE STATUS)**

- I certify that I am registered with Selective Service.
- I certify that I am not required to be registered with Selective Service because:
- I am female
  - I am in the armed forces on active duty
  - I have not reached my 18<sup>th</sup> birthday
  - I was born before 1960
  - I am a Citizen of Republic of Palau, the Republic of the Marshall Islands, or the Federated States of Micronesia
  - I am a noncitizen who first entered the U.S. after I turned 26
  - I am in the United States as a lawful non-immigrant on a student or visitor visa.

**STEP 10: STATEMENT OF EDUCATIONAL PURPOSE/CERTIFICATION STATEMENT ON REFUNDS AND DEFAULT**

I certify that I do not owe a refund on any grant, am not in default on any loan and have not borrowed in excess of the loan limits, under Title IV programs at any institution. I will use all money received (Title IV, state funds, institutional awards or other) only for expenses related to my study at Texas Wesleyan University.

I certify that as a condition of any Federal Financial Aid, I will not engage in the unlawful manufacture, distribution, dispensation, possession or use of a controlled substance during the period covered by my Federal Financial Aid.

If you are the parent or the student, by signing this application you certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked, to provide information that will verify the accuracy of your completed form. This information may include U.S. or state income state tax forms that you filed or are required to file. Also, you certify that you understand that the Secretary of Education has the authority to verify information reported on this application with the Internal Revenue Service and other federal agencies. If you sign any document related to the federal student aid programs electronically using a personal Identification number (PIN), you certify that you are the person identified by the PIN and have not disclosed that PIN to anyone else. If you purposely give false or misleading information; you may be fined up to \$20,000, sent to prison, or both.

*Signature*

*Date*

*Parent*

*Date*

## IRS Tax Return Transcript

The Office of Financial Aid requires the submission of Federal tax information to determine eligibility for aid. Information we need may be obtained based on your federal tax filing status. **Per federal regulations, our office cannot accept copies of your tax returns.**

“IRS tax transcript and IRS Data Retrieval Tool will not be available until 3 weeks after you have filed your taxes electronically. May take longer if tax return was mailed to the IRS

IRS website offers three ways to receive your tax return transcript:



1. Online—Go to <http://www.irs.gov/Individuals/Get-Transcript> and click on *Get Transcript ONLINE*.

**Print your transcript immediately.**



2. Call—800-908-9946 and follow the voice prompts.



3. Receive by Mail—Go to <http://www.irs.gov/Individuals/Get-Transcript> and click on *Get Transcript by MAIL*. **Transcript arrives in 5 to 10 calendar days.**

