

2023-2024 Independent Verification Worksheet

Last Name: _____ First Name: _____ M.I.: _____ Edgewood ID#: _____

Email: _____ Phone Number (include area code): _____

Your financial aid is considered an estimate and will not be applied to your student account until verification has been completed.

Instructions:


1. Retrieve your 2021 tax return online.
2. Complete sections A through E including student signature.

A. Family Information

List the people in your household, please include:

- Yourself
- Your spouse (if applicable)
- Your children, if you will provide more than half of their support from July 1, 2023 through June 30, 2024
- Any other people if they live with you and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2023 through June 30, 2024

Full Name	Age	Relationship	College Name (for any household member attending at least half-time between 7/1/23 and 6/30/24, and will be enrolled in a degree, diploma, or certificate program)
Example: Mark Jones	30	Spouse	Edgewood College
		Self	

If additional space is needed, please attach a separate page.

B. STUDENT/SPOUSE (if applicable) Untaxed Income Information

Untaxed Income	Student and Spouse (if applicable) Combined amount in 2021
Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. Don't include amounts reported in code DD (employer contributions 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 and pensions from IRS Form 1040—line (4a + 5a) minus (4b + 5b). Exclude rollovers. If negative, enter a 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 noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	
Other untaxed income not reported in items 41a through 41g, such as workers' compensation, disability, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1—line 13. 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 whose financial information is not reported on this form and that is not part of a legal child support agreement.	

C. STUDENT Tax and Income Information

Check one box

- I updated the FAFSA and used the IRS data retrieval option on (date)_____
- I have attached my **signed** 2021 IRS tax return.
- I will not file, am not required to file a 2021 Federal Tax Return, and I **DID NOT** work in 2021. I submitted the 4506-T to the IRS on (date)_____.

(Confirmation of nonfiling status is required. Submit form 4506-T to the IRS to obtain the acceptable nonfiling status confirmation. Complete lines 1-4 and the signature section of the attached 4506-T form.)

- I will not file, am not required to file a 2021 Federal Tax Return and I **DID** work in 2021. I submitted the attached 4506-T to the IRS on (date)_____ and completed the chart below.

(Confirmation of nonfiling status is required. Submit form 4506-T to the IRS to obtain the acceptable nonfiling status confirmation. Complete lines 1-4 and the signature section of the attached 4506-T form.)

Employers / Source of Income	Amount in 2021	W2 was received for this income
		<input type="checkbox"/> No <input type="checkbox"/> Yes, please attach W2
		<input type="checkbox"/> No <input type="checkbox"/> Yes, please attach W2

D. SPOUSE Tax and Income Information

Check one box

- Student and spouse filed 2021 taxes jointly.
- Student and spouse filed 2021 taxes separately. I have attached my spouse's **signed** 2021 IRS tax return
- Spouse will not file and is not required to file a 2021 Federal Tax Return. Table below must be completed if worked in 2021.

Employers / Source of Income	Amount in 2021	W2 was received for this income
		<input type="checkbox"/> No <input type="checkbox"/> Yes, please attach W2
		<input type="checkbox"/> No <input type="checkbox"/> Yes, please attach W2

E. Sign This Worksheet

By signing this worksheet, I certify that all the information reported on this worksheet is complete and correct. **Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

_____ Date_____

Student's Signature

Verification Deadlines:
 For the Pell Grant only, verification materials must be submitted no later than 120 days after the last date of attendance. For all other programs, our office must receive verification materials no later than one week prior to the last date of attendance.