

2019-2020 Verification Worksheet (V1)

Your application was selected by the U.S. Department of Education for review in a process called "Verification." The Office of Financial Aid must compare your FAFSA with the information you provide on this worksheet and other financial documents. If there are differences between your application information and the documents you submit, your application may need to be corrected. **The Office of Financial Aid cannot make any federal financial aid payments available to you or process a student loan request until all verification requirements have been met and the necessary corrections have been made.**

Next Steps

1. Complete the IRS Data retrieval through FAFSA on the Web. (Visit our website mountsaintvincent.edu/verification for more information). If you cannot use the IRS Data Retrieval Tool, you may order a **TAX RETURN TRANSCRIPT** from the Internal Revenue Service online at irs.gov/transcript or by phone at 1-800-908-9946. Obtain a **2017 Federal IRS Tax Return Transcript** and **W-2 forms** for yourself, your spouse (if married) or your parents/step-parent (if dependent)
2. Complete all sections and sign this worksheet.
3. Return the completed PDF and all requested documents to the Office of Financial Aid at financial.aid@mountsaintvincent.edu.

A. Student Information (Please Print)

_____	_____	_____	_____
Last Name	First Name	M.I.	CMSV ID #
_____			_____
Address (include apt. #)			Date of Birth (mm/dd/yyyy)
_____	_____	_____	_____
City	State	Zip Code	Phone # (include area code)

B. Family Information (Please Print)

Check the appropriate boxes below and provide the requested information and documents:

- Independent Students:** List the people that you (and your spouse) will support between July 1, 2019 and June 30, 2020. Include yourself, your spouse, and your dependent children. Include other people only if they now live with you and you provide more than half their support and will continue to provide more than half their support from July 1, 2019– June 30, 2020.
- Dependent Students:** List all the people in your household between July 1, 2019 and June 30, 2020. Include yourself, your parents, and your parents' other children if (a) your parents provide more than half of their support or (b) the children would be required to provide parental information when applying for Federal Student Aid. Include other people only if they now live with your parents and receive, and will continue to receive, more than half their support from them between July 1, 2018 and June 30, 2019.

Write the names of **all** family members including **yourself**. Also write the name of the college for any family member who will be attending college at least half-time between July 1, 2019 and June 30, 2020 and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

Attach Additional Sheets if necessary. Last Name, First Name, Middle Initial	Age	Relationship	College (if attending)
		Self	College of Mount Saint Vincent

C. Tax Forms & Income Information (Please Print)

1. Check here if you and/or your parent(s) *successfully used the IRS Data Retrieval Tool Process*
 Check here if you are attaching your **2017 Federal IRS Tax Return Transcript** or a **Signed Copy of 2017 Federal Tax Return.**

2. List below any person who did not file taxes in 2017, but had an income. A W-2 must be submitted for each source of income. Parents/independent students must also submit an IRS Letter of Non-Filing request at irs.gov/transcript.

Name of Non-Tax Filer in 2017	Name of Employer	Income Amount with W2

3. Both tax filers and non-tax filers must list any untaxed income received in 2017. **Be sure to enter zeroes if no funds were received.** Failure to complete this section will delay the processing of your financial aid.

Student/Spouse	FAFSA Questions 45 and/or 94	Parent(s)/ Step- Parent(s)
\$	Payments to tax-deferred pensions and savings plans (paid directly or withheld from earnings) including, but not limited to, amounts reported on W-2 Form Box 12a-12d, codes D, E, F, G, H and S.	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS form 1040 --line 28 + line 32 or 1040A -- line 17.	\$
\$	Tax exempt interest income from IRS Form 1040 -- line 8b or 1040A -- line 8b	\$
\$	Untaxed portions of IRA distributions from IRS Form 1040 -- lines (15a minus 15b) or 1040A -- lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	\$
\$	Untaxed portions of pensions from IRS Form 1040 -- lines (16A minus 16b) or 1040A-- lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	\$
\$	Child support received.	\$

D. Certification

By signing this worksheet, I [we] certify that all the information reported on this worksheet is complete and correct. If dependent, at *least one parent must sign*. **Warning: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

Student Signature

Date

Parent Signature (Dependent student) or Spouse Signature

Date

Please save and print this form once you have filled it out.

Office Use Only

Verification completed by: _____ Date: _____ EFC: _____
Authorized Signature
IRS Data Retrieval confirmed on Transaction # _____ ISIR processed date: _____