



2020-21 Verification Worksheet -- Dependent

Your FAFSA application has been selected for review in a process called “**Verification.**” *Before LBC can offer you Federal Student Aid*, the law requires that the information from your FAFSA be compared with Federal IRS tax information as well as other financial documents. If there are differences, your FAFSA information may need to be corrected. You and at least one parent must complete and sign this worksheet, attach all required documents and submit to the Financial Aid Office. See last page for how to submit documents.

Section 1: STUDENT INFORMATION

			XXX – XX - _____ Student’s Social Security Number
Last Name	First Name	M.I.	
Student’s Email Address	Student’s Phone Number (include Area Code)		
Parent’s Email Address	Parent’s Phone Number (include Area Code)		

Section 2: INCOME VERIFICATION -- Student and Parent(s)

A. FOR TAX FILERS -- If you and/or your parent(s) FILED or WILL FILE a 2018 IRS Income Tax Return, please verify your 2018 tax information one of these ways:

- 1) Use the IRS Data Retrieval Tool through the FAFSA (preferred method) --OR--
- 2) Provide a **signed copy** of your 2018 Federal Income Tax Return (1040) --OR--
- 3) Provide a 2018 IRS Income Tax Return Transcript(s) through one of these methods:
 - a) Online Request - Go to www.irs.gov
 - b) Telephone Request - 1-800-908-9946
 - c) Paper Request Form - IRS Form 4506-T-EZ or IRS Form 4506-T

STUDENT PARENT (check one)

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | I used the IRS Data Retrieval Tool when completing/updating the 2020-21 FAFSA. |
| <input type="checkbox"/> | <input type="checkbox"/> | I am unable or choose not to use the IRS DRT, and will provide my 2018 IRS Tax Return to the Financial Aid Office. |

2) **FOR NON-TAX FILERS-Parent(s)**-- If your parent(s) WILL NOT and ARE NOT REQUIRED to file a 2018 IRS Income Tax Return, complete all information requested below and attach all W-2 Forms provided by all employers. They are also required to provide a Verification of Non-Filing letter dated on or after October 1, 2019 from the IRS that indicates a 2018 IRS income tax return was not filed with the IRS or other relevant tax authority. The letter can be obtained by mailing Form 4506-T (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>) to the IRS or by requesting a tax return transcript online, directly from the IRS website (<https://www.irs.gov/individuals/get-transcript>).

FATHER MOTHER (check one)

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | I was <u>not</u> employed and had no income earned from work in 2018. <u>I will provide a Verification of non-filing letter from the IRS.</u> |
| <input type="checkbox"/> | <input type="checkbox"/> | I was employed in 2018 and have listed below the names of <u>all</u> employers, the amount earned from each employer, and whether an IRS W-2 form was provided by my employer(s). List every employer even if the employer did not issue an IRS W-2 form. <u>I have attached a copy of all 2018 W-2 form(s) and will provide a Verification of non-filing letter from the IRS.</u> |

Name of Parent’s Employer	Amount Earned in 2018	IRS W-2 Included?
<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2000.00 (example)</i>	<i>Yes (example)</i>

Name _____

Total Amount of Income Earned From Work	\$	
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3) **FOR NON-TAX FILERS-Student (check one)**

I was not employed and had no income earned from work in 2018.

I was employed in 2018 and have listed below the names of all employers, the amount earned from each employer, and whether an IRS W-2 form was provided by my employer(s). List every employer even if the employer did not issue an IRS W-2 form.

<i>Name of Student's Employer</i>	<i>Amount Earned in 2018</i>	<i>IRS W-2 Included?</i>
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2000.00 (example)</i>	<i>Yes (example)</i>
Total Amount of Income Earned From Work	\$	

Section 3: UNTAXED INCOME & OTHER FINANCIAL INFORMATION – Student and Parent(s)

Enter zero '0' if none received.

You may be required to submit W-2s issued by your employer(s).

Student	Calendar Year 2018	Parent(s) (Step-parent)
\$	Payments to tax-deferred pensions and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on W-2 Form Box 12a-12d, with codes D, E, F, G, H, and S.	\$
\$	Child support received for all children listed in your household. Do not include foster care/adoption payments or any amount that was court ordered but not actually paid.	\$
\$	Housing, food, and other living allowances paid to members of the clergy, military, and others (including cash payments and/or cash value of benefits received). Do not include the value of on-base military housing or the value of a basic military allowance for housing.	\$
\$	Veterans' non-education benefits , such as Disability, Death Pension, Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study Allowances. Do not include Post-9/11, GI Bill, Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits.	\$
\$	Any other untaxed income or benefits not reported elsewhere on this form, such as workers' compensation, disability benefits, untaxed portions of health savings accounts from IRS Form 1040, etc. Don't include <i>extended foster care benefits, student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Innovation and Opportunity Act (WIOA) educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.</i>	\$
\$	Cash or any other money paid on your behalf , not reported elsewhere on this form. (Student only). Include any payments from a parent or other person NOT reported on the 2020-21 FAFSA for things such as rent, utility bills, etc. Amounts paid on the student's behalf from a 529 plan owned by someone other than the student or the student's parents (such as grandparents or aunts/uncles) must also be included.	XXXXXX
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Don't enter untaxed combat pay reported on the W-2 (Box 23, Code Q)	
\$	Taxable earnings from need-based employment programs , such as Federal Work Study and need-based employment portions of Fellowships and assistantships.	

Section 4: VERIFICATION OF ROLLOVER

Student	Calendar Year 2018	Parent(s) (Step-parent)
Yes _____ No _____	The Untaxed Pension or IRA distribution reported on the FAFSA included a Rollover	Yes _____ No _____

