

DEPENDENT VERIFICATION WORKSHEET 2023-2024

Submit to: American International College Office of Financial Aid 1000 State Street Springfield, MA 01109 Email: Financialaid@aic.edu

| Student Name | _Student Phone | |
|-------------------|----------------|---------------|
| Address | | |
| Student ID Number | | Date of Birth |

Your 2023–2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and a parent whose information was reported on the FAFSA must complete and sign this institutional verification document, at-tach any required documents, and submit the form and other required documents to us. We may ask for additional information. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

A. Dependent Student's Family Information

List below the people in the parents' household. Include:

- The student.
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of their support from July 1, 2023 through June 30, 2024, or if the other children would be required to provide parental information if they were completing a FAFSA for 2023–2024. Include children who meet either of these standards even if the children do not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of their support and will continue to provide more than half of their support through June 30, 2024.

For any household member, excluding the parents, who will be enrolled **at least half time** in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2023, and June 30, 2024, include the name of the college.

If more space is needed, provide a separate page with the student's name and ID number at the top.

| Full Name | Age | Relationship | College | Will be Enrolled at Least Half Time (Yes or No) |
|------------|-----|--------------|--------------------------------|--|
| Jane Smith | 19 | self | American International College | yes |
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Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

AMERICAN INTERNATIONAL COLLEGE

B. Dependent Student's Income Information to be Verified (Complete <u>either</u> Box 1 or 2.)

1. Complete this section if the student, filed or will file, a 2021 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 at FAFSA.gov. In most cases, no further documentation is needed to verify 2021 IRS income tax return information that was transferred into the student's FAFSA using the IRS data retrieval tool if that information was not changed.

Check the box that applies:

- □ The student **has used** the IRS data retrieval tool in FAFSA on the Web to transfer 2021 IRS income tax return information into the student's FAFSA.
- □ The student has not yet used the IRS data retrieval tool in FAFSA on the Web, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA.
- □ The student is **unable or chooses not to use** the IRS data retrieval tool in FAFSA on the Web, and instead will provide the school a 2021 IRS Tax Return Transcript(s).

A 2021 IRS Tax Return Transcript may be obtained through:

- **Get Transcript by MAIL** Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Get Transcript ONLINE** Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.
 - Check here if a 2021 IRS Tax Return Transcript(s) is provided.
 - Check here if a 2021 IRS Tax Return Transcript(s) will be provided later.

2. Complete this section if the student, will not file and is not required to file a 2021 income tax return with the IRS.

Check the box that applies:

- □ The student was not employed and had no income earned from work in 2021.
- □ The student was employed in 2021 and has listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is attached. Please Provide copies of all 2021 IRS W-2 forms issued to the student. List every employer even if the employer did not issue an IRS W-2 form.

| 2021 Amount Earned | IRS W-2 Provided? |
|--------------------|-------------------|
| \$2,000.00 | yes |
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C. Parent's Income Information to be Verified (Complete either Box 1 or Box 2)

1. Complete this section if the student's parent(s) filed or will file a 2021 income tax return with the IRS.

(Note: The instructions below pertain to each parent included in the household as defined on page 1.)

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2021 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

- The parents **have used** the IRS data retrieval tool in FAFSA on the Web to transfer 2021 IRS income tax return information into the student's FAFSA.
- □ The parents **have not yet used** the IRS data retrieval tool in FAFSA on the Web, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA.
- □ The parents are **unable or choose not to use** the IRS data retrieval tool in FAFSA on the Web, and instead will provide the school a 2021 IRS Tax Return Transcript(s). (signature not required)

A 2021 IRS Tax Return Transcript may be obtained through:

- Get Transcript by MAIL Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Get Transcript ONLINE** Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

If the parents filed separate 2021 IRS income tax returns, the IRS data retrieval tool cannot be used and the 2021 IRS Tax Return Transcript(s) must be provided for each.

- Check here if a 2021 IRS Tax Return Transcript(s) is provided.
 - Check here if a 2021 IRS Tax Return Transcript(s) will be provided later.

2. Complete this section if the student's parent(s) will not file and is not required to file a 2021 income tax return with the IRS.

(Note: The instructions below pertain to each parent included in the household as defined on page 1.)

Check the box that applies:

- □ The parent(s) was not employed and had no income earned from work in 2021
- □ The parent(s) was employed in 2021 and has listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is attached. Please Provide copies of all 2021 IRS W-2 forms issued to the parent(s). List every employer even if the employer did not issue an IRS W-2 form.

| Employer's Name | 2021 Amount Earned | IRS W-2 Provided? |
|-----------------------------------|--------------------|-------------------|
| Jim's Cupcake Store (for example) | \$2,000.00 | yes |
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Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2021 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority.



Check here if confirmation of nonfiling is provided

Check here if confirmation of nonfiling will be provided later.

D. Certifications and Signatures

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

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

Student ID Number

Print Student's Name

Student's Signature

Parent's Signature

Date

Date