

2020- 2021 Verification Worksheet (1)

Your FAFSA was selected by the U.S. Dept. of Education for review in a process called “**verification**”. In this process, we are required by Federal law (34 CFR, Part 668) to compare the information from your application with the information provided on this form and with an IRS Tax Return Transcript of your 2018 Federal tax filing (and your spouse’s if you are married, or parents’ if you are considered dependent for Federal aid purposes). If there are differences between your FAFSA and the documents submitted, corrections will be made by our office.

What you should do:

1. Collect your (and your spouse’s or parents’) financial documents (IRS Tax Return Transcripts, 1040’s, and/or W-2’s)
2. **Complete all of the sections and sign the worksheet.** You (and a parent if you are required to provide parent income information) must complete all sections.
3. Contact the Office of Financial Aid if you have questions about this form.

A. Student Information

| | | | | |
|--------------------------|---------------|----------------------------------|------------------------|-----|
| Last Name | First Name | MI | Social Security Number | |
| Address (include apt. #) | | City | State | Zip |
| Date of Birth | Email Address | Phone Number (include area code) | | |

B. Family Information

INDEPENDENT STUDENTS: List the people that you (and your spouse) will support between July 1, 2020 and June 30, 2021. 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, 2020 – June 30, 2021. Exclude children/siblings whom are wards of the state, i.e. foster care.

DEPENDENT STUDENTS: List all the people in your household between July 1, 2020 and June 30, 2021. Include yourself, your parent(s)/step-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, 2020 and June 30, 2021. Exclude children/siblings whom are wards of the state, i.e. foster care.

INDEPENDENT AND DEPENDENT: Write the name of the college for any family member who will be attending college at least half-time between July 1, 2020 and June 30, 2021 and will be enrolled in a degree, diploma, or certificate program.

| Full Name | Age | Relationship | College (attending at least ½ time) |
|------------------------------|-----------|--------------|-------------------------------------|
| <i>Example: Martha Jones</i> | <i>22</i> | <i>Self</i> | <i>McKendree University</i> |
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If more space is needed, provide a separate page with the student’s name and ID number at the top.

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.

C. Student Tax and Income Information

Did you (the student) file a 2018 Federal Tax Return? Please check only **ONE** box below:

- Yes, I used the IRS Data Retrieval Tool to import my 2018 income information into the FAFSA.
- Yes, but I was unable or chose not to use the IRS Data Retrieval Tool. I am **attaching** a 2018 IRS Tax Return Transcript that I requested at <https://www.irs.gov/individuals/get-transcript> or I am **attaching** a signed copy of my 2018 Federal Tax Return.
- No, I was not employed and had no income earned from work in 2018.

No, I will not file and am not required to file a 2018 IRS Federal Tax Return. I did earn income from work in 2018 as listed below.

- o **Complete the chart below:** list employer(s) and the amount that was earned in 2018
- o **Attach copies** of all 2018 W-2 and 1099 forms for each employer/source listed below

| Student's Source of Income/Support | 2018 Amount Earned |
|------------------------------------|--------------------|
| | |
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D. Parents Tax and Income Information

***Dependent students only, using Parent Information of those listed on the 2020-2021 FAFSA*

Did your parent(s) file a 2018 U.S. Federal Tax Return? Please check only **ONE** box below:

- Yes, the student's parent(s) used the IRS Data Retrieval Tool to import their 2018 income information into the FAFSA.
- Yes, but the student's parent(s) were unable or chose not to use the IRS Data Retrieval Tool. I am **attaching** a 2018 IRS Tax Return Transcript that I requested at <https://www.irs.gov/individuals/get-transcript> or I am **attaching** a signed copy of my 2018 Federal Tax Return. *NOTE: If married and filing separate returns or if biological parents live together and are not married, a signed tax return is required for both parents.*
- No, Parent(s) was not employed and had no income earned from work in 2018. I am **attaching** a Verification of Non-Filing Letter for each of my parent(s) listed on the FAFSA. (IRS Verification of Non-Filing can be completed at <https://www.irs.gov/forms-pubs/about-form-4506-t>)

No, Parent(s) will not file and are not required to file a 2018 IRS Federal Tax Return. They did earn income from work in 2018 as listed below.

- o **Complete the chart below:** list employer(s) and the amount that was earned in 2018
- o **Attach copies** of all 2018 W-2 and 1099 forms for each employer/source listed below.
- o **Submit** a 2018 IRS Verification of Non-filing Letter. Each parent in the household who did not file must submit one.

| Parent(s)'s Source of Income/Support | 2018 Amount Earned |
|--------------------------------------|--------------------|
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E. Untaxed Income (Student and Parents)

Did you or your parent(s) receive any Untaxed Income during 2018?

No

Yes

If yes, please provide source (such as Untaxed Pensions, IRA Deductions and Payments, Tax Exempt Interest, and Untaxed IRA Distributions) and list annual amount below: If nothing is checked we will assume No.

| Source of Untaxed Income | Student Untaxed Income Annual Amount | Spouse or Parent Untaxed Income Annual Amount |
|--------------------------|--------------------------------------|---|
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F. Certifications and Signatures

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

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

| | | | |
|---------------------|------|---|------|
| Student's Signature | Date | Parent's Signature (dependent student only) | Date |
|---------------------|------|---|------|

| | |
|----------------------|--|
| Print student's name | Print parent's name (dependent student only) |
|----------------------|--|

Submit this form and all other required documents to the Office of Financial Aid at McKendree University:

Mail to:
 Office of Financial Aid
 701 College Road
 Lebanon, Illinois 62254

Or by Fax to:
 618-537-6530

Or in person:
 Lebanon Campus, Old Main,
 1st Floor