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2017-2018 Verification Worksheet - Independent

Your 2017-2018 application for financial aid has been selected for verification. Submit the requested documentation detailed below as soon as possible. Processing of your financial aid file cannot continue, and no financial aid can be awarded until the required information has been received. The authority for Converse College to review the requested documents can be found in CFR Title 34, Part 668.

STUDENT NAME: _____ SSN or ID: _____

Section 1: Household Information

List below the people that you and/or your spouse (if married) will support between July 1, 2017, and June 30, 2018. Be sure to include yourself, your spouse and your dependent children. Include other people only if they lived with you and received more than half their support from you and/or your spouse at the time you applied for financial aid and will continue to receive this support between July 1, 2017, and June 30, 2018. In addition, provide the name of the university or college for family members who will be attending **at least half-time** during the 2017-2018 academic year and who will be enrolled in a degree, diploma or certificate program. Always list yourself.

Full Name of Family Member	Relationship to Student	Date of Birth (mm/dd/yy)	Age	Name of University or College Attending in 2017-2018
	Self			Converse College

Section 2: Student's (and Spouse's, if married) Tax Return and Income Information

A. Tax Return Filers:

Important Note: The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2015 or had a change in marital status after December 31, 2015.

Instructions: Complete this section if the student and spouse filed a **2015** IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov.* In most cases, no further documentation is needed to verify 2015 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Check the box that applies:

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2015 IRS income tax return information into the student's FAFSA.
- The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2015 IRS income tax return information into the student's FAFSA.
- The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2015 IRS Tax Return Transcript(s)**.

A **2015 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."
- **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."
- **Automated Telephone Request** – 1-800-908-9946
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T

If the student and spouse filed separate 2015 IRS income tax returns, the IRS DRT cannot be used and the **2015 IRS Tax Return Transcript(s)** must be provided for each.

___ Check here if a **2015 IRS Tax Return Transcript(s)** is provided.

___ Check here if a **2015 IRS Tax Return Transcript(s)** will be provided later.

B. Tax Return Non-Filers:

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse did not file and is not required to file a 2015 income tax return with the IRS.

Check the box that applies:

- The student and spouse were not employed and had no income earned from work in 2015.
- The student and/or spouse were employed in 2015 and have listed below the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is provided. **[Provide copies of all 2015 IRS W-2 forms issued to the student and spouse by their employers].** List every employer even if the employer did not issue an IRS W-2 form.

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

Employer's Name	IRS W-2 Provided?	Annual Amount Earned in 2015
<i>(Example) ABC's Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>
Total Amount of Income Earned From Work		\$

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2016 that indicates a 2015 IRS income tax return was not filed with the IRS or other relevant tax authority.

___ Check here if confirmation of non-filing is provided.

___ Check here if confirmation of non-filing will be provided later.

Section 4: Certifications, Signatures and Contact Information

By signing this *Verification Worksheet*, I certify that all information reported to qualify for Federal financial assistance is complete and correct.

Student Signature: _____ **Date:** _____

Student's Mailing Address: _____

Street **City** **State and Zip**

Student's Telephone Numbers: _____

Home **Work** **Cell**

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