2017-2018 Institutional Verification Form (Independent Student)

Your Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification (CFR Title 34, Part 668). In this process, Iowa State University will be comparing information from your FAFSA with copies of 2015 Federal IRS Form 1040, W-2 forms, or other financial documents. If there are differences between your FAFSA information and your verification documents provided, the Office of Student Financial Aid may make corrections to your FAFSA using the information provided in the verification process.

Student Information

Last Name: ____________________________ First Name: ____________________________ Middle Initial: __________ University ID: ____________________________

Family and Household Information

As of today, my current marital status is:
- Single-☐
- Married or Remarried-☐
- Separated-☐
- Divorced-☐
- Widowed-☐

Date of my marital status: ____________________________ OR Does not apply-☐

If applicable, does the state in which you were married recognize same sex marriage? Yes-☐ No-☐ Does not apply-☐

- List your spouse if applicable. If your spouse is currently enrolled in college, please provide the FULL college name.

Spouse Name: ____________________________ Spouse’s College: ____________________________

Write the names of all of your household members; including yourself (and your spouse).
- Include your children if you will provide more than half of their support between July 1, 2017 and June 30, 2018 even if they do not live with you.
- Include other dependents, only if they now live with you, and you currently provide more than half of their support, and will continue to provide more than half of their support between July 1, 2017 and June 30, 2018.

<table>
<thead>
<tr>
<th>Full name of family members in the household. Start with yourself.</th>
<th>Relationship to Student</th>
<th>Birthday mm/yy</th>
<th>Name of the college for any family member who will be working toward a degree or certificate and will be enrolled at least ½ time during 2017-18 academic year.</th>
<th>Grade Level in College</th>
<th>High School Graduate by September 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Self</td>
<td>Iowa State University, Ames, IA</td>
<td>Yes ☐ No ☐</td>
<td></td>
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<td>2.</td>
<td></td>
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<td>Yes ☐ No ☐</td>
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<td>3.</td>
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<td>Yes ☐ No ☐</td>
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<td>4.</td>
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<td>Yes ☐ No ☐</td>
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<tr>
<td>5.</td>
<td></td>
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<td>Yes ☐ No ☐</td>
<td></td>
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<tr>
<td>6.</td>
<td></td>
<td></td>
<td>Yes ☐ No ☐</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Additional household members can be included on a separate sheet of paper.

Total in Household ____________ Total in College ____________

W-2 Information

Was either you or your spouse issued 2015 W-2(s)? Yes ☐ No ☐

Are amounts listed in Box 12, 12a-12d? Yes ☐ No ☐

If yes, review all codes in box(es) 12,12a-12d on the W-2. List below Box number (#), code and dollar amount ($):

<table>
<thead>
<tr>
<th>Box#</th>
<th>Code</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

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**Student’s (and spouse if married) Tax Forms and Income Information**

<table>
<thead>
<tr>
<th>CHECK</th>
<th>IF YOU (and spouse):</th>
<th>YOU (and spouse) MUST:</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>USED the IRS Data Retrieval Tool to transfer 2015 tax data to the 2017-2018 FAFSA.</td>
<td>Complete this Verification Worksheet and return it to our office. (You DO NOT NEED to provide a copy of your IRS Tax Return Transcript at this time.)</td>
</tr>
<tr>
<td>☐</td>
<td>USED the IRS Data Retrieval Tool to transfer 2015 tax data to the 2016-2017 FAFSA.</td>
<td>Complete this Verification Worksheet and return it to our office. (You DO NOT NEED to provide a copy of your IRS Tax Return Transcript at this time.)</td>
</tr>
<tr>
<td>☐</td>
<td>DID NOT (or could not) transfer 2015 income information to the FAFSA using the IRS Data Retrieval Tool.</td>
<td>Complete this Verification Worksheet and return it to our office and attach a signed copy of your Federal 2015 IRS Form 1040 filed with the IRS*. <em>New federal guidance provided on 4/24/2017 now allows the acceptance of the 1040 for 2017-2018 FAFSA verification purposes</em></td>
</tr>
<tr>
<td>☐</td>
<td>Did not work and WILL NOT file a 2015 Federal Tax Return.</td>
<td>Complete this Verification Worksheet and return it to our office. List your source of income (i.e. Disability, pension, etc.) Source:___________________________</td>
</tr>
<tr>
<td>☐</td>
<td>Filed a foreign return or had foreign income</td>
<td>Complete this Verification Worksheet and return it to our office. Provide an English translation of your foreign financial documents. If you filed a Puerto Rico tax return, provide a signed copy of the 2015 Puerto Rico 1040 tax return (does not need to be translated).</td>
</tr>
<tr>
<td>☐</td>
<td>WORKED, but NOT REQUIRED TO FILE a 2015 Federal Tax Return.</td>
<td>Complete this Verification Worksheet and return it to our office. <strong>Attach copies of all your 2015 W-2 forms.</strong> List below every employer even if the employer did not issue a W-2.</td>
</tr>
</tbody>
</table>

| Student’s (and spouse) Employer Name | 2015 Amount Earned | IRS W-2 Issued? |
|-------------------------------------|--------------------|-----------------
|                                     | Yes □ No ○         | Y/N             |
|                                     | Yes □ No ○         |                 |
|                                     | Yes □ No ○         |                 |

**Exception:** Amended Tax Filers: If you filed, an amended 2015 Federal Tax Return, you must submit a signed copy of your original Federal 2015 IRS Form 1040 as well as a signed copy of your amended Federal Tax Return (IRS Form 1040-X) even if you used the IRS Data Retrieval Tool. The IRS Data Retrieval Tool does not reflect the amended return information.

**Additional Student (and spouse) Financial Information**

If your answer is zero or does not apply, enter 0 (zero). **Do not leave blank.**

- **Taxable earnings from Federal Work-Study in 2015.**
  - Work-Study College Name: ____________________________
  - $ 

- **Annual child support received for all children in 2015.**
  - Do not include foster care or adoption payments.
  - $ 

- **List other untaxed income not reported, such as workers’ compensation, disability, money paid on your behalf, veterans noneducation benefits, Health Savings Account (IRS Form 1040 Line 25), Housing Allowance, Basic Allowance for Sustainence (Military) etc. in 2015.**
  - Do not include student financial aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.
  - List source(s) of other untaxed income: ____________________________
  - $ 

**Signature**

By signing this worksheet, I certify that all the information reported is complete and correct. I understand if I purposely give false or misleading information on this worksheet, I may be fined up to $20,000, sent to prison, or both. I am also granting the Office of Student Financial Aid permission to update the FAFSA through the Federal Student Aid online correction tool to match the values found on this and other verification documents you have or will provide.

__________________________
Student Signature (in blue or black ink)