

Westfield State University

2019-2020 Verification Worksheet

PLEASE COMPLETE AND ATTACH ALL OF THE REQUESTED INFORMATION.

Please return form to:
Financial Aid Office
333 Western Avenue, Westfield, MA 01086
Tel: 413.572.5218 - Fax: 413.579.3019
financialaid@westfield.ma.edu

STEP 1: Student Information

_____	_____	_____
Last Name	First Name	M.I.

Street Address (include apt. no.)		

_____	_____	_____
City	State	Zip Code

Home Phone Number (include area code)		

Student's Identification Number

Date of Birth

Student's Email Address

Alternate or Cell Phone

STEP 2: Family Information

DEPENDENT STUDENTS

- **A student is considered dependent if he/she was required to provide parental data on the FAFSA.**

Fill in the chart below. Be sure to include:

- Yourself and
- Your parent(s) (including a step-parent)
 - *You must include your parent(s) if you are a dependent student.*
- Other dependent children of your parent(s),
 - --If your parent(s) will provide more than half of their support from July 1, 2019, through June 30, 2020.
- Other people,
 - --If they now live with your parent(s) and your parent(s) will provide more than half of their support between July 1, 2019 through June 30, 2020.

INDEPENDENT STUDENTS

- **A student is considered independent if he/she was not required to provide parental data on the FAFSA.**

Fill in the chart below. Be sure to include:

- Yourself
- Your spouse (if you are married)
- Your children, if you will provide more than half of their support between July 1, 2019 and June 30, 2020
- Other people, only if they live in your household and you will provide more than half of their support between July 1, 2019 and June 30, 2020

FULL NAME	AGE	RELATIONSHIP	NAME OF COLLEGE/UNIVERSITY (IF AT LEAST HALF-TIME FOR 2019-2020)
		You - the student	Westfield State University

STEP 3: STUDENT TAX & INCOME INFORMATION FOR THE 2017 CALENDAR YEAR.

Check **ONLY ONE**:

- I selected IRS data retrieval when completing the FAFSA.
- I am attaching a copy of my 2017 Federal Tax Return TRANSCRIPT.
- I did not work in 2017. (Independent students - attach Verification of Nonfiling.)
- I worked but was not required to file a 2017 Federal Tax Return.

If you were not required to file a 2017 Federal Tax Return, please submit your W-2 form(s), and complete the chart below (if applicable):

Employer's Name	2017 Amount Earned	Attach IRS W2

STEP 4: PARENT OR SPOUSE TAX & INCOME INFORMATION FOR THE 2017 CALENDAR YEAR.

Refer to the chart in STEP 2. If you included a parent or spouse in your Family Information, you **must** complete this section.

If parents or spouse filed a separate 2017 IRS income tax return, the IRS DRT cannot be used and the 2017 tax return transcript must be provided for each. Please notify the financial aid office if there has been a change in marital status after 12/31/2017.

Check **ONLY ONE**:

- I selected IRS data retrieval for my parent(s) or my spouse when completing the FAFSA.
- I am attaching a copy of my parent(s) or my spouse's 2017 Federal Tax Return TRANSCRIPT.
- My parent(s) or my spouse did not work in 2017. (Attach Verification of Nonfiling.)
- My parent(s) or my spouse worked but was not required to file a 2017 Federal Tax Return.

If your parent(s) or your spouse was not required to file a 2017 Federal Tax Return, please submit W-2 form(s), and complete the chart below (if applicable):

Employer's Name	2017 Amount Earned	Attach IRS W2

STEP 5: CERTIFICATION By signing this worksheet, I certify all of the information report is complete and correct.

Student Signature

Date

Parent OR Spouse Signature (if applicable)

Date

- **Get Transcript by MAIL, ONLINE or PHONE:** Go to www.IRS.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL" or "Get Transcript ONLINE." Make sure to request the "IRS Tax RETURN Transcript" and **NOT** the "IRS Tax Account Transcript." Call Automated Telephone Request Line: 1-800-908-9946