2020-2021 Institutional Verification Form

DEPENDENT STUDENT

Student Name: ________________________________________________________________

Regis Email: _________________________ Regis ID: ____________________________

I affirm that I have read, understood, and agreed to this form in its entirety and that the information supplied is true and complete.

Student Signature: _____________________________ Date: __________________________

Parent Signature: _____________________________ Date: __________________________

Your financial aid application has been selected for verification. We are REQUIRED by federal regulation to collect this form and associated documentation before you can receive ANY federal, state or institutional aid. This form MUST be completed and turned in to the Office of Financial Aid with the appropriate documents attached. Partial or incomplete documents will NOT be accepted. This form MUST be received by our office at least 3 weeks prior to the end of the semester that you are requesting financial aid consideration for.

Form Requirements:

☐ Please fill out this form legibly in blue or black ink. A computer-generated signature or an electronic signature will NOT be accepted.

☐ Answer all the questions on this form. If answer is zero or not applicable, enter “0”. If you leave any section blank with no answer, we will incomplete the document.

☐ If your parents are now separated or divorced and filed a joint tax return, provide tax information and W2(s) for the parent whose information is listed on the FAFSA.

☐ If you parents are NOT married and currently living together, provide tax information for BOTH parents.
## Section I: Student 2018 Earnings and Tax Information

<table>
<thead>
<tr>
<th>If you (the student):</th>
<th>Do one of the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filed a 2018 Federal IRS Tax Return</td>
<td>Transfer IRS Income Tax information using the Data Retrieval Tool on FAFSA at <a href="http://www.fafsa.gov">www.fafsa.gov</a>; OR Submit a signed copy of your 2018 Federal Tax Return, including all Schedules filed; OR Submit a 2018 IRS Tax Return Transcript. You can request a transcript at: <a href="https://www.irs.gov/individuals/get-transcript">https://www.irs.gov/individuals/get-transcript</a></td>
</tr>
<tr>
<td>Had zero income and were not required to file a 2018 Federal IRS Tax Return</td>
<td>Check the box: □ I (the student), was not employed and had no income earned from work in 2018.</td>
</tr>
<tr>
<td>Earned income and but were not required to file a 2018 Federal IRS Tax Return</td>
<td>Check the box: □ I (the student), was employed in 2018 but did not file a federal tax return and have attached copies of all 2018 W-2 and/or 1099 Forms.</td>
</tr>
</tbody>
</table>

## Section II: Parent 2018 Earnings and Tax Information

<table>
<thead>
<tr>
<th>If the parent(s):</th>
<th>Do one of the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filed a 2018 Federal IRS Tax Return</td>
<td>Transfer IRS Income Tax information using the Data Retrieval Tool on FAFSA at <a href="http://www.fafsa.gov">www.fafsa.gov</a>; OR Submit a signed copy of your 2018 Federal Tax Return, including all Schedules filed; OR Submit a 2018 IRS Tax Return Transcript. You can request a transcript at: <a href="https://www.irs.gov/individuals/get-transcript">https://www.irs.gov/individuals/get-transcript</a></td>
</tr>
<tr>
<td>Had zero income and was not required to file a 2018 Federal IRS Tax Return</td>
<td>Submit a 2018 IRS Verification of Non-Filing Letter. You can request the letter here: <a href="https://www.irs.gov/individuals/get-transcript">https://www.irs.gov/individuals/get-transcript</a></td>
</tr>
</tbody>
</table>
| Earned income and but was not required to file a 2018 Federal IRS Tax Return | • Attach copies of all 2018 W-2 and/or 1099 Forms.  
• Submit a 2018 IRS Verification of Non-Filing Letter. You can request the letter here: [https://www.irs.gov/individuals/get-transcript](https://www.irs.gov/individuals/get-transcript) |
| Filed a 2018 Amended Tax Return | Provide a signed copy of 2018 1040X Amended Tax Return *AND* a signed copy of 2018 Income Tax Return, including all Schedules filed *OR* 2018 IRS Tax Return Transcript. |

## Section III: 2018 Taxable Financial Aid Information

*If section left blank, we assume “0”*

**Did you or your parent earn Federal or State need based work-study?** If you list an amount, the applicable 2018 W2(s) MUST be provided. Regis Work Study employees may obtain their W-2 by contacting HR directly at hriinfo@regis.edu.

- □ Student Amount: $________________
- □ Parent Amount: $________________
Did you report grant/scholarships on your tax return?  If amount is listed, copy of your 2018 W-2(s) AND a signed copy of your 2018 Income Tax Return MUST be provided with “SCH” indicated on the wages line even if you did the IRS Data Retrieval. If you do not submit the 2018 Federal Income Tax Return, our office will assume “0”.

☐ Student Amount: $_______________  ☐ Parent Amount: $_______________

Did you report education tax credits on your tax return (Schedule 3, line 50)?  If amount is listed, a signed copy of your 2018 Income Tax Return including Schedule 3 *OR* a copy of your 2018 IRS Tax Return Transcript MUST be provided.

☐ Student Amount: $_______________  ☐ Parent Amount: $_______________

**Section IV: Student 2018 Untaxed Income Information**

*If answer is zero or not applicable, enter “0”.*

<table>
<thead>
<tr>
<th>Income Type</th>
<th>Student</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payments to tax deferred pension and savings plans (paid directly or withheld from earnings), including but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H, and S.  <strong>Do not include code DD.</strong></td>
<td>$</td>
</tr>
<tr>
<td>IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS 1040 – line 28 + 32 (Schedule 1).</td>
<td>$</td>
</tr>
<tr>
<td>Untaxed portions of IRA distributions from IRS Form 1040 – line [4a minus 4b]. Exclude rollovers. (If negative, enter 0).</td>
<td>$</td>
</tr>
<tr>
<td>Untaxed portions of pensions from IRS Form 1040 – line [4a minus 4b]. Exclude rollovers. (If negative, enter 0).</td>
<td>$</td>
</tr>
<tr>
<td>Child support received for any of your children.  Do not include foster care or adoption payments.  Source: ______________________________________</td>
<td>$</td>
</tr>
</tbody>
</table>
| Veterans non-education benefits received such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.  
Benefit Type: ____________________________  
Source: __________________________________ | $       |
| Housing, food, and other living allowance paid to members of the military, clergy, and others (including cash payments and cash value of benefits).  Do not include the value of on-base military housing or the value of a basic military allowance for housing.  
Benefit Type: ____________________________  
Source: __________________________________ | $       |
| Other untaxed income not yet reported including worker’s compensation, disability, money or assistance from family or friends, etc.  Also include the portions of health savings accounts from IRS Form 1040 – line 25 (Schedule 1). (Do not include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplementary Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (i.e. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels).  
Benefit Type: ____________________________  
Source: __________________________________ | $       |
Section V: Parent 2018 Untaxed Income Information

*If answer is zero or not applicable, enter “0”.*

<table>
<thead>
<tr>
<th>Income Type</th>
<th>Parent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payments to tax deferred pension and savings plans (paid directly or withheld from earnings), including but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H, and S. <strong>Do not include code DD.</strong></td>
<td>$</td>
</tr>
<tr>
<td>IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS 1040 – line 28 + 32 (Schedule 1).</td>
<td>$</td>
</tr>
<tr>
<td>Untaxed portions of IRA distributions from IRS Form 1040 – line [4a minus 4b]. Exclude rollovers. (If negative, enter 0).</td>
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<td>Untaxed portions of pensions from IRS Form 1040 – line [4a minus 4b]. Exclude rollovers. (If negative, enter 0).</td>
<td>$</td>
</tr>
<tr>
<td>Child support received for any of your children. Do not include foster care or adoption payments. Source: ______________________________________</td>
<td>$</td>
</tr>
<tr>
<td>Veterans non-education benefits received such as Disability, Death Pension, or Dependency &amp; Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. Benefit Type: __________________________ Source: __________________________</td>
<td>$</td>
</tr>
<tr>
<td>Housing, food, and other living allowance paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or the value of a basic military allowance for housing. Benefit Type: __________________________ Source: __________________________</td>
<td>$</td>
</tr>
<tr>
<td>Other untaxed income not yet reported including worker’s compensation, disability, money or assistance from family or friends, etc. Also include the portions of health savings accounts from IRS Form 1040 – line 25 (Schedule 1). (Do not include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplementary Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (i.e. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels). Benefit Type: __________________________ Source: __________________________</td>
<td>$</td>
</tr>
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</table>
Section VI: Household Information

Include in your parents’ household:

- **Yourself**
- **Your parent(s)** – If your parents are not currently married, but are living together, list both parents. If your parent has remarried, list parent and their spouse. Married same-sex couples must report themselves as married and list both in the household.
- **Parent’s other children (under the ages of 24)** – If your parents will provide more than half of the other children’s support from July 1, 2020 and June 30, 2021, the children can be listed.
- If a parent is paying child support, fill out the Child Support Paid section below but do NOT list that child(ren) within the household.
- **Other people** – If other people currently live with your parents and your parents provide (and will continue to provide) more than half of their support between July 1, 2020 and June 30, 2021, list other people in the household and fill out the Other People section of this form. Documentation of support may be requested. Not providing this information WILL exclude this person from being included in the household size.
- Include the name of the college for any household 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 (dependent students should NOT include a college for your parents).

**List your parents’ CURRENT marital status:**

- Single
- Married
- Remarried
- Unmarried but living together
- Other: ____________

<table>
<thead>
<tr>
<th>List Household Members</th>
<th>Age</th>
<th>Relationship to Student (i.e. parent, brother, sister, etc.)</th>
<th>Enrolled in College at Least Half-Time</th>
<th>Name of College/University</th>
</tr>
</thead>
<tbody>
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<td>7.</td>
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*If your response is longer than space given, please attach an additional sheet of paper with your information.*
Section VII: Child Support Paid

Did your parent pay child support for child(ren) NOT living in the household during 2018?

☐ Yes  ☐ No

Child(ren)’s Names:  Total Paid in 2018:
_____________________________________________________________ $ ________________
_____________________________________________________________ $ ________________
_____________________________________________________________ $ ________________

Name of person(s) to whom the child support was paid in 2018:

___________________________________________________________________________________

Documentation of child support paid may be requested.

OTHER PEOPLE:

If there are other people/siblings age 24 and over living in the household, you MUST provide documentation of support for those included. Write a statement explaining the extenuating circumstances as to why you/your parent(s) are responsible for the individual and in what way you/your parent(s) are supporting this person with: food, shelter, and health insurance. You are REQUIRED to report any earnings or benefits the individual received. You MUST explain why adults are NOT receiving income. If you do NOT provide the amount of benefits received in your statement, we will incomplete this form.

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