



**2018-2019 -- (V5) Verification Worksheet
Independent Student**

A. Independent Student Information

Student's Last Name	First	M.	Student's SSN
Student's Street Address			Student's Date of Birth
City, State	Zip		Student's E-mail Address
Student's Home Phone			Student's Cell Phone

B. Number of Household Members and Number in College

List below the people in the student's household. Include:

- The student.
- The student's spouse, if the student is married.
- The student's or spouse's children if the student or spouse will provide more than half of their support from July 1, 2018, through June 30, 2019, even if the children do not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of their support and will continue to provide more than half of their support through June 30, 2019.

For any household member who will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2018, and June 30, 2019, include the name of the college.

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

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		<i>Self</i>	<i>Williamson College of the Trades</i>	<i>Yes</i>

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. Verification of 2016 IRS Income Tax Return Information for Students

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 2016 or had a change in marital status after the end of the 2016 tax year on December 31, 2016.

Instructions: Complete this section if the student and spouse filed or will file a 2016 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 2016 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2016 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 2016 IRS income tax return information into the student's FAFSA once the 2016 IRS income tax return has been filed.
- The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2016 IRS Tax Return Transcript(s)** (signature not required).

A **2016 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." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- 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." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

If the student and spouse filed separate 2016 IRS income tax returns, the IRS DRT cannot be used and the **2016 IRS Tax Return Transcripts** must be provided for both.

_____ Check here if a **2016 IRS Tax Return Transcript(s)** is provided.

_____ Check here if a **2016 IRS Tax Return Transcript(s)** will be provided later.

- The student and/or spouse did not file taxes. Proceed to Section D to complete Proof of non-filing status.

D. Proof of Non-filing Status- Student and Spouse

Instructions: Complete this section only if you or your spouse did **NOT** file 2016 taxes.

Either I, or my spouse, worked and filed a joint 2016 tax return.

If you were able to check the above box as true, please proceed to Section E. You do not need to provide Non-filing Status information.

2016 Tax Requirements for dependents and independents.

Filing Status	Minimum Gross Income (under 65)	Minimum Gross Income (over 65)
Single	\$10,350.00	\$11,900.00
Head of Household	\$13,350.00	\$14,900.00
Married filing jointly	\$20,700.00	\$21,950.00 (one spouse) \$23,200.00 (both spouses)
Married filing separately	\$4,050.00	\$4,050.00
Widow(er) w/ Dependent Child	\$16,650.00	\$17,900.00
Dependent Child	\$6,300.00	-

Any non-filing member of the family must submit proof of non-filing status from the IRS or other relevant tax authority dated on or after October 1, 2017 that indicates a 2016 IRS income tax return was not filed with the IRS or other relevant tax authority. To obtain a 2016 Proof of Non-filing visit <https://www.irs.gov/individuals/get-transcript>, or call 1-800-908-9946.

1. **Student Section:** Please check the statement(s) that applies:

- I worked in 2016 but I did not make enough to file.
- I did not work in 2016.
- My spouse worked in 2016 but did not make enough to file.
- My spouse did not work in 2016.

If you worked in 2016 but did not file taxes copies of your 2016 W2(s) and 2016 Proof of Non-filing Letter must be submitted with this form.

I understand that federal law requires me to file taxes if I made over the minimum amount listed in the tax table above. I certify that I did not meet filing requirements and was not required to file taxes for 2016. I understand that certifying false information on this document is an act of perjury and can result in loss of aid eligibility as well as legal consequences.

Student Signature: _____ Date: _____

Spouse's Signature: _____ Date: _____

E. Verification of 2016 IRS Income Tax Return Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2016 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:

- A copy of IRS Form 4868, “Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,” that was filed with the IRS for tax year 2016;
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2017;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2016; and
- A copy of IRS Form W-2 for each source of employment income received for tax year 2016 and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2016.

Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2016, provide both of the following:

- A **2016 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; *and*
- A signed copy of the 2016 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

Individuals Who Were Victims of IRS Tax Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; *and*
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.
- A victim of IRS identity theft who is not able to obtain a **2016 IRS Tax Return Transcript** or use the IRS DRT must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer's identity, the IRS will provide, by U.S. Postal Service, a printout of the tax filer's 2016 IRS income tax return information.

Individuals Who Filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.
- If an individual filed or will file a 2016 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, provide a signed copy of that 2016 income tax return(s).

**Certification and Signature
(Independent Student)**

F. Certification and Signature

Each person signing below certifies that all of the information reported is complete and correct.

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

Print Student's Name

Student's SSN Number

Student's Signature (Required)

Date

Spouse's Signature (Optional)

Date



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Identity and Statement of Educational Purpose (To Be Signed at the Institution)

The student must appear in person at Williamson College of the Trades to
(Name of Postsecondary Educational Institution)

verify his or her identity by presenting unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed and the name of the official at the institution authorized to receive and review the student's ID.

In addition, the student must sign, in the presence of the institutional official, the following:

Statement of Educational Purpose

I certify that I _____ am the individual signing this
(Print Student's Name)

Statement of Educational Purpose and that the federal student financial assistance
I may receive will only be used for educational purposes and to pay the cost of attending
Williamson College of the Trades for 2018-2019.
(Name of Postsecondary Educational Institution)

(Student's Signature)

(Date)

(Student's ID/ SSN Number)



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Identity and Statement of Educational Purpose (To Be Signed With Notary)

If the student is unable to appear in person at Williamson College of the Trades
(Name of Postsecondary Educational Institution)

to verify his or her identity, the student must provide:

- (a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and
- (b) The original notarized Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

Statement of Educational Purpose

I certify that I _____ am the individual signing this
(Print Student's Name)

Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending
Williamson College of the Trades for 2018-2019.
(Name of Postsecondary Educational Institution)

(Student's Signature)

(Date)

(Student's ID/SSN Number)

Notary's Certificate of Acknowledgement

State of _____

City/County of _____

On _____, before me, _____,
(Date) (Notary's name)

personally appeared, _____, and provided to me
(Printed name of signer)

on basis of satisfactory evidence of identification _____
(Type of government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal

(seal)

(Notary signature)

My commission expires on _____(Date)