BLUEFIELD COLLEGE

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Student ID number

# 2017-2018 V1 Verification Worksheet – Independent Student

Your 2017-2018 Free Application for Federal Student Aid (FAFSA) was selected for verification. Bluefield College Financial Aid Office will compare your FAFSA with the information on this form and with any other required documents. If there are difference between your FAFSA and verification documents, we will make the corrections electronically. If necessary, our office will request additional information.

**Please include the student's name and Student ID number on all pages submitted.**

**Funding is limited and we strongly encourage you to submit all required documentation as quickly as possible.**

Name______________________________________________
Last First Middle

Address______________________________________________
Street Address Apt. # City State Zip Code

Date of Birth ______________________ Email Address ______________________________

Primary Phone Number ________________________ Alternate Phone Number ______________________

## Section A: Household information
## Please complete all boxes for persons listed

**List the people in your household, including:**

- Yourself (and your spouse, if you are married); **AND**
- Your children, if you will provide more than half of their support, even if they do not live in your house, between July 1, 2017 and June 30, 2018, **AND**
- Other people if they now live with you, you provide more than half of their support and you will continue to provide more than half of their support between July 1, 2017 and June 30, 2018.

Note: Include the name of the college for any household members 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, 2017 and June 30, 2018.

| Full Name | Age | Relationship to Student | College/University |
|---|---|---|---|
| | | Self | Bluefield College |
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Attach additional page(s) if necessary

Student ID number

Name______________________________________________

Last First Middle

## Section B: Student Tax Return and Income Information

1. **Select and verify your 2015 Federal IRS income tax information below**:

☐ Preferred Method to Verify Income: I used the IRS DATA Retrieval Tool (DRT) on the FAFSA website: www.fafsa.ed.gov and did not make any changes to the information transferred from the IRS.

☐ I have already completed a tax return, but was not able to use the DRT. An IRS Tax Return Transcript is attached.

☐ I will file a tax return, but have not filed at this time. I understand my application will not be finalized until this requirement is satisfied.

☐ I did not have any earned income in 2015.

2. If you were paid for working in 2015, but DID NOT file and are NOT REQUIRED to file a 2015 Federal IRS income tax return, list below the employers and/or sources of income and the amounts of all income received in 2015. *Attach copy of 2015 W2's.*

| Employer's Name and/or Source(s) of Income | 2015 Amount Earned |
|---|---|
| | |
| | |
| | |
| Total Amount of Income Earned From Work | $ |

## Section C: Spouse Tax Return and Income Information

1. **Your spouse must select and verify their 2015 Federal IRS income tax information below:**

☐ My spouse used the IRS DATA Retrieval Tool (DRT) on the FAFSA website: www.fafsa.ed.gov and did not make any changes to the information transferred from the IRS.

☐ My spouse has already completed a tax return, but was not able to use the DRT. An IRS Tax Return Transcript is attached.

☐ My spouse will file a tax return, but has not filed at this time. I understand my application will not be finalized until this requirement is satisfied.

☐ My spouse did not have any earned income in 2015.

☐ I do not have a spouse.

2. If your spouse was paid for working in 2015, but did not file and is not required to file a 2015 Federal IRS income tax return, list below the employers and/or sources of income and the amounts of all income received in 2015. *Attach copy of 2015 W2's.*

| Employer's Name and/or Source(s) of Income | 2015 Amount Earned |
|---|---|
| | |
| | |
| | |
| Total Amount of Income Earned From Work | $ |

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Student ID number

Name________________________________________________________________
Last First Middle

## Section D: Untaxed Income

**If any item does not apply,** enter "N/A" for Not Applicable where a response is requested, or enter 0 (zero) in an area where an amount is requested. If the student was required to provide parental information on the FAFSA, answer the question below as it applies to the student and the student's parent(s) whose information is on the FAFSA. If the student was not required to provide parental information on the FAFSA, answer each question below as it applies to the student (and the student's spouse, if married).

**To determine the correct annual amount for each item**: If you paid or received the same dollar amount every month in 2015, multiply that amount by the number of months in 2015 you paid or received that amount. If you did not pay or receive the same amount each month in 2015, add together the amounts you paid or received each month during 2015. If more space is needed, provide a separate page with the student's name and ID number at the top.

**A. Distributions to untaxed portion of an Individual Retirement Account (IRA) and/or untaxed portion of pensions**

List any distributions (direct or withheld from earnings) to untaxed IRA or pensions during the 2015 tax year:

| Name of Person Who Made the Payment | Pension or IRA | Annual Amount of Benefits Received in 2015 |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | Total payments to untaxed pension and/or IRA | $ |
| | | |

Please review all the information on this form and any supporting documentation for completeness, including all signatures. **Make sure the student last name and ID number are clearly indicated on the top of each page.**

If I purposely give false or misleading information on this worksheet, I may receive a fine, a prison sentence, or both. By signing this information request, I am certifying that all information is complete and correct.

Student Signature ________________________________ Date ______________

Spouse Signature ________________________________ Date ______________

*Please note that email is not always a secure method of communication and may inadvertently expose your information if misdirected. Bluefield College suggests using fax, U.S. Postal Service or personal delivery as a more secure method of delivery. If you choose to submit information through email, Bluefield College will not be responsible for any exposure of data.

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Student ID number

# IRS Tax Return Transcript Information:

A **2015 IRS Tax Return Transcript** may be obtained through:

- Online Request – Go to www.irs.gov . Under the Tools heading on the IRS homepage, click on the "Get a tax transcript" option. You can choose between two options:
  - Get Transcript by Mail- transcripts arrive in 5 to 10 calendar days at the address on file
  - Get Transcript ONLINE – requires creation of an account with personal identifiers
- Telephone Request – 1-800-908-9946
- Paper Request form – IRS Form 4506T-EZ or IRS Form 4506-T

In most cases, for electronic tax return filers, 2015 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2015 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the 2015 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 6–8 weeks after the 2015 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

If the parents 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

** ***Verification of 2015 Income Information for Individuals with Unusual Circumstances*** **

### Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2015 must provide:

- A signed copy of the IRS Form 1040X that was filed;
- A signed copy of the original return that was filed or a tax return transcript; ***and***
- Transcript obtained from the IRS that list tax account information.

### 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.

*If you are a victim of IRS tax-related identity theft, be sure to contact the IRS Identity Protection Specialized Unit at **800-908-4490.**

### Individuals Who Filed Non-IRS Income Tax Returns

An individual who filed or will file a 2015 income tax return with the relevant taxing authority of a U.S. territory, commonwealth, or with a foreign central government must provide:

- A transcript that was obtained at no cost from the relevant taxing authority of a U.S. territory (Guam, American Samoa, the U.S. Virgin Islands) or commonwealth (Puerto Rico and the Northern Mariana Islands), or a foreign central government, that includes all of the tax filer's income and tax information required to be verified for tax year 2015; **or**
- If a transcript cannot be obtained at no cost from the relevant taxing authority, a signed copy of the 2015 income tax return(s).