

## 2026-27 Verification Worksheet for Independent Student

**All sections must be completed. Financial aid cannot be offered until verification is complete.**

### A. Student Information

|               |              |                |
|---------------|--------------|----------------|
| _____         | _____        | _____          |
| Last Name     | First Name   | Student ID     |
| _____         | _____        | _____          |
| Date of Birth | Phone Number | E-mail Address |

### B. Family Size Information

Family Size includes the following:

- The student
- The student's spouse, if applicable
- The student's dependent children only if **all three** of the following are true:
  - They live with the student (or live apart due to college enrollment);
  - They receive more than half of their support from the student; **AND**
  - They will continue to receive more than half their support from the student during the award year.
- Other persons only if **all three** of the following true:
  - They live with the student;
  - They receive more than half of their support from the student; **AND**
  - They will continue to receive more than half their support from the student during the award year.

The criteria for "dependent children" or "other persons" align with the requirements of whom the student could claim as a dependent on a U.S. tax return if the student were to file a U.S. tax return at the same time as completing the 2026-27 FAFSA. As a result, unborn children should NOT be included in family size.

| Full Name of Each Family Member Claimed | Age | Relationship to Student<br>(child, step-child, etc.) | Do you, the student,<br>provide more than half<br>of the financial support<br>for this person? |
|-----------------------------------------|-----|------------------------------------------------------|------------------------------------------------------------------------------------------------|
| 1.                                      |     | Self (Student)                                       | _____                                                                                          |
| 2.                                      |     | Spouse (if applicable)                               | _____                                                                                          |
| 3.                                      |     |                                                      | Yes      No                                                                                    |
| 4.                                      |     |                                                      | Yes      No                                                                                    |
| 5.                                      |     |                                                      | Yes      No                                                                                    |
| 6.                                      |     |                                                      | Yes      No                                                                                    |
| 7.                                      |     |                                                      | Yes      No                                                                                    |

If more space is needed, provide a separate page.

## Student Information

Last Name

First Name

MI

Student ID

### C. 2024 Income Tax Return Information

Has the student's marital status changed since December 31, 2024?

Status change: \_\_\_\_\_  
(married, divorced, separated)

Date of Status Change: \_\_\_\_\_

Tax Filing Status - **select the appropriate responses for both the student and spouse (if applicable)**

Student   Spouse

I filed a 2024 Federal Income Tax Return (IRS Form 1040)

- Provide a 2024 IRS Tax Transcript or a signed copy of your 2024 income tax return and (if applicable) Schedules 1, 2, & 3.

I filed an Amended 2024 Federal Income Tax Return (IRS Form 1040X)

- Provide a signed copy of your 2024 amended income tax return and (if applicable) Schedules 1, 2, & 3.

I plan to file a 2024 Federal Income Tax Return

I will not file a 2024 Federal Income Tax Return. Select one of the two options below.

1. I was not employed and earned no income from work in 2024.
2. I earned income in 2024. The amount and sources are listed below.

**Note:** If you earned at or above the IRS filing threshold, you **MUST** file a 2024 income tax return to be eligible for federal financial aid. The 2024 IRS filing threshold table is found at this link: <https://www.irs.gov/newsroom/heres-who-needs-to-file-a-tax-return-in-2024>.

Complete this section if the student and/or spouse will not file and are not required to file a 2024 income tax return with the IRS.

List the names of each employer in 2024, the amount earned, and whether a W-2 or 1099 form was received. Provide copies of all 2024 IRS W-2 forms and 1099's issued to the student or spouse. List every employer even if they did not issue a W-2 or 1099.

| Student or Spouse        | Employer's Name    | Annual Amount Earned | Form attached? |
|--------------------------|--------------------|----------------------|----------------|
| <i>(Example) Student</i> | <i>ABC Company</i> | <i>\$5,000</i>       | <i>Yes</i>     |
|                          |                    |                      |                |
|                          |                    |                      |                |
|                          |                    |                      |                |
|                          |                    |                      |                |

If more space is needed, provide a separate page.

A 2024 IRS Tax Return Transcript may be obtained through:

- Get Transcript Online: Go to [www.irs.gov](https://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Request the "Return Transcript."
- Telephone request: 1-800-908-9946.
- Paper Request Form: IRS Form 4506T-EZ or IRS Form 4506-T.

### D. Certification and Signature

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

\_\_\_\_\_  
Student's Handwritten Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Handwritten Signature

\_\_\_\_\_  
Date

**WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.**