

STUDENT FINANCIAL SERVICES

2016-2017 INDEPENDENT HOUSEHOLD RESOURCES VERIFICATION WORKSHEET

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Your 2016-2017 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this institutional verification document, attach any required documents, and submit the form and other required documents to us. We may ask for additional information. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

If your 2015 household income is \$11,880 or below you must complete and attach the Low Income and Asset Clarification Statement.

Deadline: To determine your eligibility for federal and/or state funds, your verification documents must be received by our office no later than August 15, 2017 or 120 days after your last date of enrollment, whichever comes first. Failure to do so by the stated deadline will result in a loss of eligibility for the current academic year.

MTC must review the requested information, under the financial aid program rules (34 CFR, Part 668).

A. STUDENT INFORMATION

Print the information requested below:

_____ Last Name	_____ First Name	_____ M.I.	_____ MTC ID
_____ Address (include apt.no.)			_____ MyMTC Email Address
_____ City	_____ State	_____ Zip Code	_____ Student Date of Birth
_____ Student Home Phone Number (include area code)			_____ Student Alternate or Cell Phone (include area code)

B. FAMILY INFORMATION

List below the people in the your household, include:

- > The student
- > The 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, 2016 through June 30, 2017, even if the children do not live with the student.
- > Other people if they now live with the student and the student or spouse provide more than half of their support and will continue to provide more than half of their support through June 30, 2017.

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, 2016 and June 30, 2017, include the name of the college.

Full Name	Age	Relationship*	College Attending in 2016-2017	Will be enrolled at least half time?
1.		Self	Midlands Technical College	Yes/No
2.				
3.				
4.				
5.				
6.				

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

***If relationship listed is not a spouse or a child, you must also complete Section D of the Clarification statement explaining the reason this individual should be included in your household size.*

C. INDEPENDENT STUDENT INCOME TO BE VERIFIED

1. TAX RETURN FILERS Complete this section if you, the student filed or will file a 2015 income tax return with the IRS.

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If you have not already used the tool, go to FAFSA.gov, log in to your FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS income information to transfer 2015 IRS income tax information into your FAFSA. It takes 2-3 weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and 8-11 weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.

Check the box that applies:

	I am required to file a 2015 IRS Tax Return and have been granted a filing extension by the IRS. I have attached a copy of IRS Form 4868 and a copy of all of my IRS Form W2’s for each source of employment received in 2015, or if self-employed, a signed statement certifying the amount of my Adjusted Gross Income (AGI) and US income tax paid for 2015.
	I <u>have used</u> the IRS Data Retrieval Tool in FAFSA on the Web to transfer my (and if married my spouse’s) 2015 IRS income information into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. <i>MTC will use the IRS information that was transferred in the verification process.</i>
	I am <u>unable or choose not to</u> use the IRS Data Retrieval Tool in FAFSA on the Web, and I have attached a copy of my 2015 IRS Tax Return Transcript – not photocopies of the income tax return. (See below for instructions on how to request an IRS Tax Return Transcript).
	I, the student or my spouse if married, filed an amended 2015 IRS Tax Return. I have attached both an IRS Tax Return Transcript and a signed copy of the 2015 IRS Form 1040X that was filed with the IRS. (See below for instructions on how to request an IRS Tax Return Transcript).

How to request an IRS Tax Return Transcript

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 “Get a Tax Transcript.” Next, click “Get Transcript by MAIL.” Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.”
- › **Telephone Request** - 1.800.908.9946
- › **Paper Request Form** - IRS Form 4506T-EZ or IRS Form 4506-T

2. TAX RETURN NON-FILERS Complete this section if you, the student will not file and are not required to file a 2015 income tax return with the IRS.

Check the box that applies:

	I was not employed and had no income earned from work in 2015. You must submit a Verification of Non-filing letter from the IRS for the 2015 tax year. Contact the IRS at 1.800.829.1040 or print and mail form 4506-T (www.irs.gov).
	I or my spouse if married was employed in 2015 and have listed below the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is attached. Attach copies of all 2015 W-2 forms issued to you and if married my spouse by employers. <i>List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, attach a separate page with your name and MTC ID at the top.</i> You must submit a Verification of Non-filing letter from the IRS for the 2015 tax year. Contact the IRS at 1.800.829.1040 or print and mail form 4506-T (www.irs.gov).

Employers’ Name	2015 Amount Earned	IRS W-2 Attached?
<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>yes</i>

D. PAYMENTS TO TAX- DEFERRED PENSION AND RETIREMENT SAVINGS

List any payments (direct or withheld from earnings) to tax-deferred pension and retirement saving plan (e.g. 401(k) or 403 (b) plans, including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d with codes D,E,F,G,H, and S.)

Name of Person Who Made Payment	Total Amount Paid in 2015

E. CHILD SUPPORT RECEIVED

List the actual amount of any child support received in 2015 for the children in your household. **Do not include** any foster payments, adoption payments, or any amount that was court-ordered but not actually paid.

Name of Adult Who Received Payment	Name of Child for Whom Support Was Received	Amount of Child Support Received in 2015

F. HOUSING, FOOD, AND OTHER LIVING ALLOWANCES PAID TO MEMBERS OF THE MILITARY, CLERGY, AND OTHERS

Include cash payments and/or the cash value of benefits received. **Do not include** the value of on-base military housing or the value of a basic military allowance for housing.

Name of Recipient	Type of Benefit Received	Amount of Benefit Received in 2015

G. VETERANS NON-EDUCATION BENEFITS

List the total amount of veterans non-education benefits received in 2015. Include Disability, Death Pension, Dependency, and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances. **Do not include** federal veterans educational benefits such as: Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits, Post-9/11 GI Bill

Name of Recipient	Type of Veterans Non-education Benefit	Amount of Benefit Received in 2015

H. OTHER UNTAXED INCOME

List the amount of other untaxed income not reported and not excluded elsewhere on this form. Include untaxed income such as worker's compensation, disability, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040 Line 25, Railroad Retirement Benefits, etc.

Do not include any items reported or excluded in E - G above. In addition, do not include student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Innovation and Opportunity Act (WIOA), educational benefits, on base military housing or a military allowance, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

Name of Recipient	Type of Other Untaxed Income	Amount of Other Untaxed Income Received in 2015

I. MONEY RECEIVED OR PAID ON THE STUDENT'S BEHALF

List any money received or paid on the student's behalf (e.g. payment of student's bills) and not reported elsewhere on this form. Enter the total amount of cash support the student received in 2015. Include support from a parent whose information was not reported on the student's 2016-2017 FAFSA, but do not include support from a parent whose information was reported. For example, if someone is paying rent, utility bills, etc., for the student or gives cash, gift cards, etc., Include the amount of that person's contributions **unless the person is the student's parent whose information is reported on the student's 2016-2017 FAFSA**. Amounts paid on the student's behalf also include any distributions to the student from a 529 plan owned by someone other than the student or the student's parents, such as grandparents, aunts, and uncles of the student.

Purpose: e.g., Cash, Rent, Books	Amount Received in 2015	Source

J. ADDITIONAL INFORMATION

So that we can fully understand the student's family's financial situation, please provide below information about any other resources, benefits, and other amounts received by the student and any members of the student's household. This may include items that were not required to be reported on the FAFSA or other forms submitted to the financial aid office, and include such things as federal veterans education benefits, military housing, SNAP, TANF, etc.

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

Name of Recipient	Type of Financial Support	Amount of Financial Support Received in 2015

Comments:

K. SIGN THIS WORKSHEET

Each person signing below certifies that all of the information reported is complete and correct. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

Student's Signature Date

Spouse's Signature (optional) Date