

## 2023-2024 Dependent Verification Worksheet

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ M.I.: \_\_\_\_\_ Edgewood ID#: \_\_\_\_\_

Parent Email: \_\_\_\_\_ Phone Number (include area code): \_\_\_\_\_

Your financial aid is considered an estimate and will not be applied to your student account until verification has been completed.

### Instructions:



1. Retrieve your and/or your parent's signed 2021 tax return.
2. Complete sections A through E including both student and parent signatures.

### A. Family Information

List the people in your parents' household, please include:

- Yourself - even if you live on your own.
- Your parent(s) (including stepparent).
- Your siblings, step siblings, or other people who live with your parents and your parents will provide more than half of their support from 7/1/23 through 6/30/24.

Full Name	Age	Relationship	College Name (for any household member attending at least half-time between July 1, 2023 and June 30, 2024, and will be enrolled in a degree, diploma, or certificate program)
Example: Martha Jones	20	Sister	Edgewood College
		Self	

If additional space is needed, please attach a separate page.

### B. STUDENT/PARENT Untaxed Income Information

Untaxed Income	Student Amount in 2021	Parent Amount in 2021
Payments to tax-deferred pension and retirement 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. <b>Don't include</b> amounts reported in code DD (employer contributions toward employee health benefits).		
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1—total of lines 16 + 20.		
Child support received for any children. <b>Don't include</b> foster care or adoption payments.	N/A	
Tax exempt interest income from IRS Form 1040—line 2a.		
Untaxed portions of IRA distributions and pensions from IRS Form 1040—line (4a + 5a) minus (4b + 5b). <b>Exclude rollovers.</b> If negative, enter a zero here.		
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). <b>Don't include</b> the value of on-base military housing or the value of a basic military allowance for housing.		
Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.		
Other untaxed income not reported in items 41a through 41g (student) and 89a through 89g (parent), such as workers' compensation, disability, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1—line 13. <b>Don't include</b> extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.		
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent whose financial information is not reported on this form and that is not part of a legal child support agreement.		N/A

**C. STUDENT Tax and Income Information:**

Check one box

- Student 2021 IRS tax return **IS NOT** listed on my award letter
  - Student 2021 IRS tax return is not listed on my award letter and is not required.
- Student 2021 IRS tax return **IS** listed on my award letter-
  - I updated the FAFSA and used the IRS data retrieval option for the student financial information on (date)\_\_\_\_\_
  - I have attached the student's signed 2021 IRS tax return.
  - I will not file and am not required to file a 2021 Federal Tax Return. Table below must be completed if you worked in 2021.

Employers / Source of Income	Amount in 2021	W2 was received for this income
		<input type="checkbox"/> No <input type="checkbox"/> Yes, please attach W2
		<input type="checkbox"/> No <input type="checkbox"/> Yes, please attach W2

**D. PARENT Tax and Income Information**

Check one box

- Parent 2021 IRS tax return **IS NOT** listed on my award letter
  - Parent 2021 IRS tax return is not listed on my award letter and is not required.
- Parent 2021 IRS tax return **IS** listed on my award letter-
  - I updated the FAFSA and used the IRS data retrieval option for the parent financial information on (date)\_\_\_\_\_
  - I have attached the parent's signed 2021 IRS tax return.
  - I will not file, am not required to file a 2021 Federal Tax Return, and I **DID NOT** work in 2021. I submitted the 4506-T to the IRS on (date)\_\_\_\_\_.

(Confirmation of nonfiling status is required. Submit form 4506-T to the IRS to obtain the acceptable nonfiling status confirmation. Complete lines 1-4 and the signature section of the attached 4506-T form.)

- I will not file, am not required to file a 2021 Federal Tax Return and I **DID** work in 2021. I submitted the attached 4506-T to the IRS on (date)\_\_\_\_\_ and completed the chart below.

(Confirmation of nonfiling status is required. Submit form 4506-T to the IRS to obtain the acceptable nonfiling status confirmation. Complete lines 1-4 and the signature section of the attached 4506-T form.)

Employers / Source of Income	Amount in 2021	W2 was received for this income
		<input type="checkbox"/> No <input type="checkbox"/> Yes, please attach W2
		<input type="checkbox"/> No <input type="checkbox"/> Yes, please attach W2

**E. Sign This Worksheet**

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. At least one parent must sign. **Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

\_\_\_\_\_ Date \_\_\_\_\_  
Student's Signature

\_\_\_\_\_ Date \_\_\_\_\_  
Parent's Signature

**Verification Deadlines:**  
For the Pell Grant only, verification materials must be submitted no later than 120 days after the last date of attendance. For all other programs, our office must receive verification materials no later than one week prior to the last date of attendance.