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***Form 5***

**2020-2021 Independent Verification Worksheet**

**Federal Aid Programs**

Your financial aid application has been chosen for a review process called “Verification.” Verification is a process by which Tougaloo College compares the information on your application with the IRS transcripts of you and/or your spouse’s 2018 tax transcript, W-2 forms, and any other financial documents. The law says that our institution has a right to ask for this information before we award you Federal aid. If there are differences in the application and the financial documents, then an electronic correction is made to your application.

**What you should do for verification?**

1.Complete and **sign** this verification worksheet.

1. Return with this worksheet, a SIGNED IRS transcript of you and your spouse’s (if married) 2018 tax returns.
2. Submit the information to the financial aid office as soon as possible.
3. Once the financial aid office has your documentation, the verification will be completed and any corrections will be made by the financial aid office.
4. Once verification is completed, then you can be awarded federal aid.

**A. Student Information**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­­­­­\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Last Name First Name M.I. Social Security Number

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address (include apt. no.) Date of Birth

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City State Zip code Phone number (include area code)

**B. Family Information**

List the people in your household, include:

* Yourself and your spouse if you have one.
* Your children if you will supply over fifty percent of their support from July 01, 2020 to June 30, 2021. Other people that now live with you, **if** you will supply over half of their support from July 01, 2019 to June 30, 2020.

**Write the names of all household members in the space below. Write the name of the college you or any other household member will be attending at least half time between July 01, 2020 and June 30, 2021 in a degree seeking program.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Full Name** | **Age** | **Relationship** | **College** |
|  |  | Self |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**C. Tax Forms**

You must provide us with some information from you and your spouse’s (if married) 2018 tax returns in the form of a SIGNED IRS transcript. Please see the enclosed document on how to request an IRS Transcript.

**Check one line if it applies to you, and check one line if it applies to your spouse.**

**Student** **Spouse**

* Check and attach a SIGNED IRS transcript of your 2018 tax returns**.**

**\*(Please see enclosed document on how to request an IRS transcript) \_\_\_\_\_ \_\_\_\_\_**

* Check and attach all 2018 W-2 forms \_\_\_\_\_ \_\_\_\_\_
* Check and complete: IRS transcript will be provided to the school by \_\_\_\_\_\_\_\_\_\_\_\_ (date). \_\_\_\_\_ \_\_\_\_\_
* Check if you will not file or if you are not required to file a 2018 U.S. Income Tax Return. \_\_\_\_\_ \_\_\_\_\_

**(Please be sure to complete section E if you did not file)**

***To obtain an IRS tax return* *transcript, go to www.IRS.gov and click on the “Order a Return or Account Transcript” link, or call 1-800-908-9946.* *Make sure to request the “IRS tax return transcript” and not the “IRS tax account transcript.” For whom you are requesting the transcript for; you will need the Social* *Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2017* *IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return* *filers, and up to eight weeks for paper IRS tax return filers.***

**D. Untaxed Income Information** (please check Yes or No, and provide annual amount if Yes)

**Annual Amount Annual Amount**

**received by student received by spouse**

**Did you or your spouse receive:**  **Yes No**

Payment to tax-deferred pension and savings

plans (paid directly or withheld from earnings). $ $

Workers’ compensation $ $

Veterans Non Educ. Benefits $ $

Education Credits $ $

Child support $ $

Other Welfare Benefits $ $

Cash support/money paid on your behalf

(paid by non-custodial parent or others) $ $

Housing, food, living allowances

(paid to members of the military, clergy, others) $ $

**Additional Untaxed Income Information**

1. Did you or someone in your household, listed in Section B, receive benefits from theSupplemental Nutrition Assistance Program**,** or **SNAP (formerly known as food stamps)** anytime during the **2018** calendar year?

­­­­­­­**\_\_\_\_Yes ­­­\_\_\_\_No Amount $\_\_\_\_\_\_\_\_\_\_\_ (If yes, please provide documentation)**

1. **Did you or your spouse, if married, pay child support in 2019?**

­­ **\_\_\_\_Yes ­­­\_\_\_\_No (If yes, please provide the information below and supporting documentation)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Person Who Paid Child Support** | **Name of Person to Whom Child Support was Paid** | **Name of Child for Whom Child Support was Paid** | **Amount of Child Support Paid in 2017** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**E. Non-Tax Filers Information**

If you or your spouse did not file and **are not required to file** a 2018 Federal Income Tax return, list below you and your spouse’s employer(s) and any source of untaxed income received in 2018.

I (we) did not file and **are not required to file** a 2018 Federal income tax return. (Check all that apply.)

Student\_\_\_\_\_ Spouse\_\_\_\_\_

Recipient Source Amount(s)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**F. Sign this Worksheet**

By signing this worksheet, I (we) certify that all the information reported on it 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 Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Spouse (Optional) Date

**Mail completed form to:**

**Tougaloo College**

**Financial Aid**

**500 West County Line Road**

**Tougaloo, MS 39174**

**Fax: 601-977-6164 or 601-977-7866**