



Form 5

2019-2020 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 2017 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.
2. Return with this worksheet, a **SIGNED** IRS transcript of you and your spouse's (if married) 2017 tax returns and W-2 forms.
3. Submit the information to the financial aid office as soon as possible.
4. Once the financial aid office has your documentation, the verification will be completed and any corrections will be made by the financial aid office.
5. 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, 2019 to June 30, 2020. Other people that now live with you, **if** you will supply over half of their support from July 01, 2018 to June 30, 2019.

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, 2019 and June 30, 2020 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) 2017 tax returns in the form of a SIGNED IRS transcript. Tax returns include the 2016 IRS Form 1040, 1040A, 1040EZ, TeleFile Fax Record, a tax return from Puerto Rico or a foreign income tax return. 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.

- | | <u>Student</u> | <u>Spouse</u> |
|---|----------------|---------------|
| • Check and attach a SIGNED IRS transcript of your 2017 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 2017 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)

| | Yes | No | Annual Amount received by student | Annual Amount received by spouse |
|--|-----|-----|--------------------------------------|-------------------------------------|
| Did you or your spouse receive: | | | | |
| 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

- Did you or someone in your household, listed in Section B, receive benefits from the Supplemental Nutrition Assistance Program, or SNAP (formerly known as food stamps) anytime during the 2017 calendar year?
 ___ Yes ___ No Amount \$ _____ (If yes, please provide documentation)
- Did you or your spouse, if married, pay child support in 2018?
 ___ 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 2017 Federal Income Tax return, list below you and your spouse's employer(s) and any source of untaxed income received in 2017.

I (we) did not file and are not required to file a 2017 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.

 Student Date

 Spouse (Optional) Date

Warning:
 If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Mail completed form to:
 Tougaloo College
 Financial Aid
 500 West County Line Road
 Tougaloo, MS 39174
 Fax: 601-977-6164 or 601-977-7866