Troy University
Financial Aid Office
134 Adams Administration Bldg.
Troy, AL 36082

Independent Verification Worksheet (V6) 2014-2015

Call 1-800-414-5756 for questions

V6

Your 2014-2015 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 provide 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 worksheet, attach any required documents, and submit the form and other required documents to the financial aid office at Troy University. The financial aid office may ask for additional information. If you have questions about verification, contact the financial aid office as soon as possible so that your financial aid will not be delayed. You must return this form to the address listed on this form.

A. Student Information

Student's Name:______________________ Social Security Number:______________
First M.I. Last

Date of Birth:______________ Home Phone:______________ Cell Phone:______________

Email:______________________________ Work Phone:______________

Address:____
Street/P.O. Box City State Zip

B. Family Information

List below the people in the student's household. Include:

- The student.
- The student's 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, 2014, through June 30, 2015, even if the children do not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of their support and will continue to provide more than half of their support through June 30, 2015.

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, 2014, and June 30, 2015, include the name of the college. If more space is needed, provide a separate page with the student's name and social security number at the top.

Full Name	Age	Relationship	College
You, the student			**Troy University**

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

Student's Name____**SSN:**________________________

C. Verification of 2013 IRS Income Tax Return Information for Student Tax Filers

Instructions: Complete this section if the student and spouse filed or will file a 2013 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov.* In most cases, no further documentation is needed to verify 2013 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed. In most cases, for electronic filers, 2013 IRS income tax return information for the IRS DRT is available within 2–3 weeks after the 2013 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2013 paper IRS income tax returns, the 2013 IRS income tax return information is available for the IRS DRT within 8–11 weeks after the 2013 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT.

Check the box that applies:

☐ The student (and, if married, my spouse) has used the IRS DRT in *FAFSA on the Web* to transfer 2013 IRS income tax return information into the student's FAFSA.

☐ The student (and, if married, my spouse) has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2013 IRS income tax return information into the student's FAFSA once the 2013 IRS income tax return has been filed.

☐ The student (and, if married, my spouse) is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2013 IRS Tax Return Transcript(s), W-2 Forms, & other IRS documents**. (signature not required)

To obtain a **2013 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." Use the Social Security Number and date of birth of the first person listed on the 2013 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2013 IRS income tax return). In most cases, for electronic filers, a **2013 IRS Tax Return Transcript** may be requested from the IRS within 2–3 weeks after the 2013 IRS income tax return has been accepted by the IRS. Generally, for filers of 2013 paper IRS income tax returns, the **2013 IRS Tax Return Transcript** may be requested within 8–11 weeks after the 2013 paper IRS income tax return has been received by the IRS.

If the student and spouse filed separate 2013 IRS income tax returns, **2013 IRS Tax Return Transcripts, W-2 Forms, & other IRS documents** must be provided for both.

☐ Check here if a **2013 IRS Tax Return Transcript(s)** is provided.

☐ Check here if a **2013 IRS Tax Return Transcript(s)** will be provided later.

Verification of 2013 Income Information for Student Nontax Filers

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2013 income tax return with the IRS. You must complete a 2014- 2015 Living Expense Statement form. It can be located at **http://trojan.troy.edu/financialaid** under **2014-2015 Forms**.

Check the boxes that apply:

☐ The student was not employed and had no income earned from work in 2013.

☐ The student's spouse (if married) was not employed and had no income earned from work in 2013.

☐ The student (and/or the student's spouse if married) was employed in 2013 and have listed below the names of all employers, the amount earned from each employer in 2013, and whether an IRS W-2 form is provided. [Provide copies of all 2013 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, provide a separate page with the student's name and social security number at the top.

Employer's Name	2013 Amount Earned	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	*$2,000.00 (example)*	*Yes (example)*

Student's Name______________________________**SSN:**____________________

E. Other Untaxed Income for 2013

If any item does not apply, enter "N/A" for Not Applicable where a response is requested, or enter 0 in an area where an amount is requested.

Each question below applies to the student (and the student's spouse, if married) whose information is on the FAFSA.

To determine the correct annual amount for each item: If you paid or received the same dollar amount every month in 2013, multiply that amount by the number of months in 2013 you paid or received it. If you did not pay or receive the same amount each month in 2013, add together the amounts you paid or received each month. If more space is needed, provide a separate page with the student's name and ID number at the top.

a. Payments to tax-deferred pension and retirement savings

List any payments (direct or withheld from earnings) to tax-deferred pension and retirement savings plans (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 the Payment	Total Amount Paid in 2013

b. Child support received

List the actual amount of any child support received in 2013 for the children in your household. **Do not include** foster care payments, adoption payments, or any amount that was court-ordered but not actually paid.

Name of Adult Who Received the Support	Name of Child For Whom Support Was Received	Amount of Child Support Received in 2013

c. 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 2013

d. Veterans non-education benefits

List the total amount of veterans non-education benefits received in 2013. Include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances. **Do not include** federal veteran's 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 2013

Student's Name______________________________________**SSN:**________________________

e. Other untaxed income

List the amount of other untaxed income not reported and not excluded elsewhere on this form. Include untaxed income such as workers' 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 A – D 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 Investment Act (WIA) educational benefits, 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 2013

f. 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 2013. Include support from a parent whose information was not reported on the student's 2014–2015 FAFSA. For example, if someone is paying rent, utility bills, etc., for the student or gives cash, gift cards, etc. 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 2013	Source

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 2013

Comments:

Student's Name____**SSN:**_______________________

D. Independent Student's Other Information to Be Verified

1. Complete this section if someone in the student's household (listed in Section B) received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2012 or 2013 calendar years.

☐ One of the persons listed in Section B of this worksheet received SNAP benefits in 2012 or 2013.

Note: If we have reason to believe that the information regarding the receipt of SNAP benefits is inaccurate, we may require documentation from the agency that issued the SNAP benefits in 2012 or 2013.

2. Complete this section if you or your spouse, if married, paid child support in 2013.

☐ Either I, or if married my spouse listed in Section B of this worksheet paid child support in 2013. I have indicated below the name of the person who paid the child support, the name of the person to whom the child support was paid, the names of the children for whom child support was paid, and the total annual amount of child support that was paid in 2013 for each child. If asked by the school, I will provide documentation of the payment of child support. If you need more space, attach a separate page that includes the student's name and social security number at the top.

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Amount of Child Support Paid in 2013

Note: If we have reason to believe that the information regarding child support paid is not accurate, we may require additional documentation, such as:

- A copy of the separation agreement or divorce decree that shows the amount of child support to be provided;
- A statement from the individual receiving the child support certifying the amount of child support received; or
- Copies of the child support payment checks, money order receipts, or similar records of electronic payments having been made.

E. Certification and Signature

Please check each box and sign and date at the bottom of the form to affirm that you acknowledge and understand that:

☐ You must complete the FAFSA IRS Data Retrieval or submit a copy of your 2013 IRS Tax Return Transcript, W-2(s), and other IRS documents when you file your IRS income tax return for verification to be considered complete.

☐ Adjustments to your financial aid eligibility may be required due to the results of this verification process, which may change the sources and amounts of your Financial Aid Award offer.

☐ If you file or later file an amended 1040X tax form, you agree to notify Troy University's Financial Aid Office and submit a signed copy of the original 2013 IRS income tax return that was filed with the IRS or a 2013 IRS Tax Return Transcript for the 2013 tax year; and a signed copy of the 2013 IRS 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet. If married, the spouse's signature is optional.

WARNING: If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.

__________________________________ ____________________

Student's Signature Date

__________________________________ ____________________

Spouse's Signature (Optional) Date