

V1: Independent Verification Worksheet 2024-2025

Student Name		MBU ID		_
Address	City	State	Zip Code	_
Student's Primary Phone #	Student's Primary E	Email Address		_
Spouse (if married) Primary Phone #	Student'	's Marital Status		_
	SECTION 1: FAMILY SIZE	 	······································	

<u>Instructions:</u> Complete the below chart for your family size according to the FAFSA definition.

Family Size includes the following:

- Yourself (the student)
- Your spouse, if applicable
- Your dependent children, if <u>all</u> the following are true:
 - o They live with you (or live apart because of college enrollment),
 - o They receive more than half of their support from you, AND
 - They will continue to receive more than half their support from you from July 1, 2024 through June 30, 2025
- Other persons if <u>all</u> the following are true:
 - They live with you,
 - o They receive more than half of their support from you, AND
 - o They will continue to receive more than half their support from you from July 1, 2024 through June 30, 2025

Note: The provided criteria for "dependent children" or "other persons" align with the requirement that family size align with whom the student could claim as a dependent on a U.S. tax return if the student were to file a U.S. tax return at the time of completing the 2024-2025 FAFSA. As a result, you should not include any unborn children in the family size.

If more space is needed, please provide a separate page with your name and student ID at the top.

Full Name	Age	Relationship
		SELF

Student Name	MBU	J ID	

SECTION 2: VERIFICATION OF 2022 INCOME INFORMATION FOR STUDENT TAX FILERS

<u>Instructions:</u> Complete this section if the student and spouse (if married) <u>filed or will file</u> a 2022 IRS income tax return(s). Check all that apply:

□ I/We consented to transfer the 2022 IRS income tax information and it was successfully transferred into the FAFSA.

• In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

☐ I/We consented to transfer the 2022 IRS income tax information and it was not transferred into the FAFSA.

• If the 2022 income tax return information for student and spouse (if applicable) was not available or could not be used, provide the MBU Financial Aid Office with a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules. If the student and spouse (if applicable) filed "married filing separately", both the student and spouse's tax return transcripts for 2022 will need to be sent to us.

A 2022 IRS Tax Return Transcript may be obtained through:

- Get Transcript Online
 - Go to www.irs.gov
 - Click "Get Your Tax Record."
 - Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript."
 - To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Get Transcript by Mail
 - Go to www.irs.gov
 - Click "Get Your Tax Record."
 - Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and NOT the "Account Transcript."
 - The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Automated Telephone Request
 - Call 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form
 - IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.
- ☐ I/We filed an amended IRS Income Tax Return for 2022.
 - Provide a signed copy of the 2022 IRS Form 1040X "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:
 - Updated income and tax information from the IRS on an ISIR record with all tax information from the original return;
 - A 2022 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; OR
 - A signed copy of the 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS.

ıdent Name	nt NameMBU ID					
	SECTION 3: VERIFICA	TION OF 2022 INCOME FOR NO	N-TAX FILE	RS		
	ete this section <u>ONLY</u> if the studen each of the steps below.	t and/or spouse will not, <u>and were not</u>	required to,	— file a 2022 incon	ne tax retur	
1: Student Nor	n-Tax Filer - check the appropriate	box below:				
tudent was not tudent was emp ther an IRS W-2	employed and had no income earned bloyed in 2022 and have listed below form or an equivalent document is p	d from work in 2022. the names of all employers, the amoun provided. List every employer even if th	e employer did			
tional space is n	leeded, provide a separate page whi	ch includes the student's name and MBI	J ID.			
	Employer's Name	Name of Parent Employed	IRS W-2 or Equivalent Document Provided by Employer?	Amount Farned in		
				\$		
				\$		
				\$		
				\$		
		Total Amount of Income Ear	ned from Wor	k \$		
	Employer's Name		IRS W-2 or Equivalent Document An Provided by Employer?			
			\$			
			\$			
			\$			
			\$			
		Total Amount of Income Earned f	rom Work \$			
3: Non-Tax Fil	er Statement if income earned in 2	2022				
ne sources of 202	22 income earned from work and the	e individual(s) has not filed and is not rece amount of income from each source.	quired to file a	a 2022 income tax	return, as w	
	if non-filing statement is provided. if non-filing statement will be provi	ded later.				
o 4: Submit copi	es of all 2022 W-2 Forms issued to	the student and spouse (if applicable)) who had any	income in 2022.		
tional documen	tation may be requested by the fina	ncial aid office upon review of your wor	ksheet and inc	come information.		
n person signing	below certifies that all of the inforn	nation reported is complete and correct				
				\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	ou purposal	
lent Signature (R	Required)	Date	_	WARNING: If y	isleading	
lent Signature (R	Required)	Date	_		isleading ou may be	

Date

Spouse Signature (If applicable)