

V5: Dependent Verification Worksheet 2025-2026

STUDENT INFORMATION

Student Name	MBU ID
Address	City State Zip Code
Student's Primary Phone #	Student's Primary Email Address
Parent's Primary Phone #	Parent's Marital Status
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SECTION 1: FAMILY SIZE

Instructions: Complete the below chart for your family size according to the FAFSA definition.

Family Size includes the following:

- Yourself (the student)
- Your parents, even if you are not living with them.
 - o Exclude a parent who has died or is not living in the household because of separation or divorce.
 - o Include a parent who is on active duty in the U.S. Armed Forces apart from the family.
- Your siblings, if all the following are true:
 - o They live with your parents (or live apart because of college enrollment),
 - o They receive more than half of their support from your parents, AND
 - They will continue to receive more than half their support from your parents from July 1, 2025 through June 30, 2026
- Other persons if <u>all</u> the following are true:
 - They live with your parents,
 - o They receive more than half of their support from your parents, AND
 - They will continue to receive more than half their support from your parents from July 1, 2025 through June 30, 2026

Note: The provided criteria for "dependent children" or "other persons" align with the requirement that family size align with whom the parent could claim as a dependent on a U.S. tax return if the parent were to file a U.S. tax return at the time of completing the 2025-2026 FAFSA. As a result, parents 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 Nam	e MBU ID
<u>S</u> i	ECTION 2: VERIFICATION OF 2023 INCOME INFORMATION FOR PARENT TAX FILERS
	The instructions below apply to each parent included in the family size on the FAFSA. Notify the financial aid office ad a change in marital status after December 31, 2023.
Instructions: Co	omplete this section if the parents filed or will file a 2022 IRS income tax return(s). Check all that apply:
 In most 	red to transfer the 2023 IRS income tax information and it was successfully transferred into the FAFSA. It cases, no further documentation is needed to verify 2023 income information that was transferred into the C's FAFSA using income and tax information directly from the IRS.
 If the 2 Aid Off If the p 	ed to transfer the 2023 IRS income tax information and it was not transferred into the FAFSA. 023 income tax return information for the parent was not available or could not be used, provide the MBU Financial ice with a 2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules. Farents filed "married filing separately", both parents' tax return transcripts for 2023 will need to be sent to us. IRS Tax Return Transcript may be obtained through: Get Transcript Online Get Transcript Online 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 textenabled 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 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 2023.

- Provide a signed copy of the 2023 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 2023 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 the income and tax information required to be verified; OR
 - \circ A signed copy of the 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Student Name	MBU ID
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SECTION 3: VERIFICATION OF 2023 INCOME INFORMATION FOR STUDENT TAX FILERS

<u>Instructions:</u> Complete this section if the student <u>filed or will file</u> a 2023 IRS income tax return(s). Check all that

apply: | I consented to transfer the 2023 IRS income tax information and it was successfully transferred into the

• In most cases, no further documentation is needed to verify 2023 income information that was transferred into the FAFSA. student's FAFSA using income and tax information directly from the IRS.

☐ I consented to transfer the 2023 IRS income tax information and it was not transferred into the FAFSA.

- If the 2023 income tax return information for student was not available or could not be used, provide the MBU Financial Aid Office with a 2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules. A 2023 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 filed an amended IRS Income Tax Return for 2023.
 - Provide a signed copy of the 2023 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 2023 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 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Student Name		MBU II	D	
S	ECTION 4: VERIFICATIO	ON OF 2023 INCOME FOR NON-TA	XX FILERS	
nstructions: Complete this eturn with the IRS. The testeps below.	s section <u>ONLY</u> if parents an erm "parents" refers to the p	d/or student will not, <u>and were not red</u> arent or parents included in the family s	quired to, file size of the FAFS	a 2023 income tax A. Follow each of t
☐ Neither parent was empl☐ One or both parents weremployer in 2023, and whe	ther an IRS W-2 form was pro		employer did no	
1	Employer's Name	Name of Parent Employed	IRS W-2 or Equivalent Document Provided by Employer?	Annual Amount Earned in 2023
				\$
				\$
				\$
				\$
		Total Amount of Income Ear	ned from Work	\$
Student was employed in 023, and whether an IRS W	V-2 form or an equivalent do	I from work in 2023. the names of all employers, the amount cument is provided. List every employer ovide a separate page which includes the	even if the em	ployer did not
Student was employed in 023, and whether an IRS W	n 2023 and have listed below V-2 form or an equivalent doo	the names of all employers, the amount cument is provided. List every employer	even if the eme student's nam	ployer did not
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Student Name		MBU ID
	Instructions: Complete Section A OR Se	ection B.
Section A: CAN YOU APPEAR I	N PERSON AT MARY BALDWIN UNIVERSITY?	YES - Complete only Section A <u>in person</u> at MBU
	the Mary Baldwin University Office of Financial Aid to ven (ID), such as (but not limited to) a driver's license, oth	
n addition, the student must sign, <u>in</u>	the presence of the institutional official, the Statemen	nt of Educational Purpose provided below.
Statemen	t of Educational Purpose	Office of Financial Aid Use Only
I certify that I,(Print Stud	ent's Name) , am the individual	Valid Government-issued Photo Identification presented:
	l Purpose and that the Federal student financial used for educational purposes and to pay the cost of or 2024-2025.	Date Received:
(Student Signature)	(Date)	Received By:
the student is unable to appear in p a) A copy of the unexpired vali not limited to, a driver's lice		identity, the student must provide to the institution: snowledged in the notary statement below, such as, but ence of a notary. The form must be notarized. We
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My commission expires on _

(Date)

WITNESS my hand and official seal

(Notary signature)

DEP V5