



Center for Student Financial Planning and Services
 99 Main Street
 Franklin MA, 02038
 508-541-1518 sfp@dean.edu

Office Use ONLY
NEW _____ RET _____
LN _____
ID _____

Independent Student's Income Information to Be Verified

For 2015, have you (and/or your spouse, if married) completed your IRS Income Tax Return? Check one

- I/we have already completed my return () see instructions for **tax filers** below
- I/we will file, but have not yet completed my tax return () see instructions for **tax filers** below
- I'm/we're *not* going to file..... () see instruction for **non-tax filers** below

How much did you (the student) earn from working in 2015? Check one

- I (the student) **were not employed** and had no income earned from work in 2015()
- I (the student) **was employed in 2015** and have listed below the names of all employers, the amount earned from each employer in ()

Employer Name	2015 amount earned
	\$
	\$
	\$

How much did your spouse (if applicable) earn from working in 2015? Check one

- I (the spouse) **were not employed** and had no income earned from work in 2015 ()
- I (the spouse) **was employed in 2015** and have listed below the names of all employers, the amount earned from each employer in 2015..... ()

Employer Name	2015 amount earned
	\$
	\$
	\$

TAX FILERS- IRS DATA RETREIVAL TOOL

Students who have already filed or will file a 2015 IRS tax return must submit a 2015 tax transcript to the college OR, you can use the IRS Data Retrieval Tool on the FAFSA.

IRS Data Retrieval Tool Instructions: For those who have already filed a 2015 IRS tax return

The best way to verify income is by using the **IRS data Retrieval Tool** in the FAFSA. To complete this process, log on to your FAFSA at www.fafsa.gov and select "Make FAFSA Corrections" and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool. **If successful, an updated FAFSA Transaction will be sent to the College.**

NON-TAX FILERS

Students and/or spouses who did not file a 2015 federal tax return **must** submit **IRS form 4506T** to the IRS (not to Dean College) indicating the 2015 tax year to confirm your non filing status. The IRS will then send a letter to you verifying that you have not filed a tax return for 2015. **A copy of this letter should be sent to the college along with copies of ALL 2015 W2's.** The IRS Form 4506T can be found on www.irs.gov



Center for Student Financial Planning and Services
99 Main Street
Franklin MA, 02038
508-541-1518 sfp@dean.edu

Office Use <u>ONLY</u>
NEW _____ RET _____
LN _____
ID _____

Student/Spouse	<u>ADDITIONAL FINANCIAL INFORMATION</u> (Answer all questions if none, put \$0. Do not leave any questions blank)
\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040—line 50 or 1040A—line 33
\$	Child Support PAID because of divorce or separation. Don't include support for children in your (or your spouses) household.
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships
\$	Taxable student grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Don't include untaxed combat pay.
\$	Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. Don't include amounts reported in code DD (Employer contributions toward employee health benefits).
\$	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040—line 28 + line 32 or 1040A—line 17.
\$	Child support RECEIVED for all children. Don't include foster care or adoption payments.
Student/Spouse	<u>UNTAXED INCOME</u> (Answer all questions if none, put \$0. Do not leave any questions blank)
\$	Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.
\$	Untaxed portions of IRA distributions from IRS Form 1040—lines (15a minus 15b) or 1040A—lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here
\$	Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here
\$	Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).
\$	Veterans' non-education Benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
\$	Other untaxed income not reported in items 45a through 45h, such as workers' compensation, disability, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040—line 25. Don't include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.
\$	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.

By signing this form, each person certifies that all the information is correct and complete.
WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student Signature: _____ Date: _____

Spouse Signature: _____ Date: _____