



INDEPENDENT VERIFICATION WORKSHEET 2023-2024

We ask that you use the IRS Data Retrieval Tool on the FAFSA to submit your taxes for verification. If you are ineligible to use the IRS Data Retrieval Tool, please submit a 2021 tax return transcript which can be requested at IRS.gov or a signed copy of your federal tax return. For Puerto Rico residents or foreign income, a signed tax return is acceptable.

This worksheet must be returned to our office with all sections completed before your financial aid can be finalized.

Student Last Name, First Name, M.I., Student ID Number, Address, Date of Birth, City, State, Zip, Phone Number

HOUSEHOLD INFORMATION: List the people in your household: (You may attach a separate sheet if necessary):

- 1. Yourself and your spouse. Also include your children or other dependents, if you will provide more than half of their support from July 1, 2023 – June 30, 2024.
2. Other people in the household only if they now live with you, and you will provide more than half of their support from July 1, 2023 through June 30, 2024.
3. Include the college of any household member who will be enrolled in a degree, diploma, or certificate program at least half-time during July 1, 2023 – June 30, 2024.

Table with 4 columns: Full Name, Age, Relationship, College attending (2023-2024). Row 1: Self, Assumption University.

STUDENT INCOME INFORMATION- Check one below

- I utilized the 2021 FAFSA IRS Data Retrieval Tool
I was not employed in 2021 and did not earn income (see non-filers\*)
I am attaching my 2021 IRS Tax Return Transcript
I earned income but was not required to file a 2021 IRS Return
I am attaching my signed 2021 IRS Tax Return
Complete chart below if you selected this and attach W2s. (See non-filers\*)

Table with 3 columns: Source of income, 2021 amount, W2 attached? Add sheet if needed

SPOUSE INCOME INFORMATION- Check one below

- I utilized the 2021 FAFSA IRS Data Retrieval Tool
I was not employed in 2021 and did not earn income (see non-filers\*)
I am attaching my 2021 IRS Tax Return Transcript
I earned income but was not required to file a 2021 IRS Return. Complete chart below if you selected this and attach W2's (see non-filers below\*)
I am attaching my signed 2021 IRS Tax Return

Table with 3 columns: Source of income, 2021 amount, W2 attached? Add sheet if needed

\*STUDENT/SPOUSE NON-TAX FILERS: If you or your spouse did not file a 2021 IRS return, you must request a copy of the 2021 IRS verification of non-filing letter at IRS.gov. Select "Get My Tax Record," and click "Get Transcript Online." Another option is to mail the IRS Form 4506-T to the IRS.

I (we) certify that all of the information is complete. An incomplete form will result in delays of processing my financial aid.

Student Signature, Date, Spouse Signature, Date