

Verification of 2014 Income
• **DEPENDENT STUDENT** •
2015-2016 Worksheet

| | | |
|------------------------------------|----------------------------|-----------------------------|
| <hr/> <i>Last Name</i> | <hr/> <i>First Name</i> | <hr/> <i>Middle Initial</i> |
| <hr/> <i>MSU Billings ID / SSN</i> | <hr/> <i>Date of Birth</i> | |
| <hr/> <i>Mailing Address</i> | <hr/> <i>Apartment No.</i> | <hr/> <i>Phone Number</i> |
| <hr/> <i>City</i> | <hr/> <i>State</i> | <hr/> <i>ZIP code</i> |
| <hr/> <i>Email Address</i> | | |

STUDENT 2014 TAX & INCOME INFORMATION

A. Check the box that applies to you (the student):

- ☐ **I HAVE FILED** a 2014 IRS income tax return **and used the Data Retrieval Tool (DRT)** to transfer my 2014 IRS income tax return information to my FAFSA
- ☐ **I HAVE NOT YET FILED** a 2014 IRS income tax return. Once my 2014 IRS income tax return is filed, I will use the DRT to transfer my 2014 IRS income tax return information to my FAFSA.
- ☐ I am **unable to or choose not to use the DRT** to transfer my 2014 IRS income tax return information. Instead, I will submit a 2014 IRS Tax Return Transcript. **(Tax returns are NOT accepted!)**

➤ **Attach your 2014 IRS Tax Return Transcript**

To obtain an IRS tax return transcript, go to www.irs.gov and click on the "Get Transcript of Your Tax Records" link or call 1-800-908-9946. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2014 IRS tax return was filed). It takes up to three weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. You may also visit your local IRS office and request a tax return transcript.

- ☐ **I WILL NOT FILE**, and am not required to file, a 2014 IRS income tax return. (Proceed to Section B)

B. If you did NOT file, and are not required to file, a 2014 IRS income tax return, list your employer(s) below and any source(s) of 2014 income. If no income was earned, enter "\$0" or "N/A" in the spaces below.

➤ **Attach copies of ALL W-2s or other earning statements**

| Source of Income | Amount earned in 2014 | IRS W-2 issued by employer? (Yes/No) |
|------------------|-----------------------|--------------------------------------|
| | \$ | |
| | \$ | |
| | \$ | |

PARENT 2014 TAX & INCOME INFORMATION

Parent's Marital Status: ☐ Married or Remarried ☐ Never Married
☐ Divorced or Separated ☐ Widowed
☐ Unmarried and both parents living together

Effective Date of Parent's Marital Status (month/year): _____

A. Check the box that applies to you (the parent of the student):

- ☐ I (the parent) **HAVE FILED** a 2014 IRS income tax return and used the **Data Retrieval Tool (DRT)** to transfer my 2014 IRS income tax return information to my FAFSA
- ☐ I (the parent) **HAVE NOT YET FILED** a 2014 IRS income tax return. Once my 2014 IRS income tax return is filed, I will use the DRT to transfer my 2014 IRS income tax return information to my FAFSA.
- ☐ I (the parent) am **unable to or choose not to use the DRT** to transfer my 2014 IRS income tax return information. Instead, I will submit a 2014 IRS Tax Return Transcript. **(Tax returns are NOT accepted!)**

➤ **Attach your 2014 IRS Tax Return Transcript**

To obtain an IRS tax return transcript, go to www.irs.gov and click on the "Get Transcript of Your Tax Records" link or call 1-800-908-9946. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2014 IRS tax return was filed). It takes up to three weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. You may also visit your local IRS office and request a tax return transcript.

c. I (the parent) **WILL NOT FILE**, and am not required to file, a 2014 IRS income tax return. (Proceed to Section B)

B. If you (the parent) did **NOT** file, and are not required to file, a 2014 IRS income tax return, list your employer(s) below and any source(s) of 2014 income. If no income was earned, enter "\$0" or "N/A" in the spaces below.

➤ **Attach copies of ALL W-2s or other earning statements**

| Source of Income | Amount earned in 2014 | IRS W-2 issued by employer? (Yes/No) |
|------------------|-----------------------|--------------------------------------|
| | \$ | |
| | \$ | |
| | \$ | |

CERTIFICATION AND SIGNATURES

You (the student) and one parent whose information was reported on the FAFSA must sign and date this form in ink. A printed name will not be accepted. Each person signing this form is certifying that all the information reported on it is complete and correct. If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student's Signature

Date

Parent's Signature

Date