

2020-21 Verification Worksheet

This worksheet and any accompanying tax documents should be submitted in person, by postal mail, fax, or through password-protected email. Any and all submitted tax documentation must have the student's BW ID number on the top of the form, without the ID it will NOT go in the student's file.

Section 1. Student Information

Student Name (print first and last): _____ BW Student ID#: _____

Address: _____ Date of Birth: _____

City: _____ State: _____ Zip: _____ Daytime Phone #: _____

When verification of your FAFSA is complete and a change has been realized, you will be notified in one of the following ways:
1) you will receive your first award letter; 2) you will receive a revised award letter; or 3) you will receive other communication from our staff.
If the verification does not result in any changes, the awards listed on your most recent award letter will be finalized.

Section 2. Household Information

1) Select your status. You are considered a dependent student if you were required to provide parental information on your FAFSA.

☐ **Dependent students:** List the people in your parents' household, excluding foster children. Include:
(1) yourself, regardless of where you live,
(2) the parent(s) with whom you live,
(3) your parents' other children and other people, if (a) your parents will provide more than half of their support between 7/1/20 - 6/30/21, or (b) the children could be considered a dependent on their own FAFSA.

☐ **Independent students:** List the people in your household, excluding foster children. Include:
(1) yourself,
(2) your spouse, if you are married,
(3) your children and other people, if you will provide more than half of their support from 7/1/20 through 6/30/21.

2) Write your name and age on the first line below. **THEN** list the names, ages, and relationships to you for everyone else in your household (per the guidelines above). If anyone *but your parents* will be enrolled at least half-time in a degree or certificate program between July 1, 2020 and June 30, 2021, include the name of the school they will be attending. If more space is needed, continue this table on a separate page with the student's name and SSN at the top.

| Full name | Age | Relationship to Student in Section 1 | College/University in 2020-21 |
|-----------|-----|--------------------------------------|-------------------------------|
| | | Self (student from Section 1) | Baldwin Wallace University |
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Section 3. Tax Forms and Income Information (Check boxes that apply.) Do not leave this section blank!

| | TAX FILER: Filed a 2018 Federal Tax Return (see below) | NON-TAX FILER: Earned income in 2018 but did not file/was not required to file a 2018 Federal Tax Return (see below) | NON-TAX FILER: Did not earn income in 2018 and did not file a 2018 Federal Tax Return (see below) |
|--|--|--|---|
| You (student) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Your spouse (if applicable) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Your Parent #1 (dependent students only) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Your Parent #2 (dependent students only) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

TAX FILERS: If you did not use the IRS Data Retrieval Tool you will be required to submit a signed copy of your 2018 IRS tax return or if you are unable to locate a copy, you can submit a 2018 IRS Tax Return Transcript from the IRS (available online - www.irs.gov/transcript).

Refer to the Missing Information Email/Letter the student received from our office to determine if tax return information must be submitted. This information can also be obtained by most students on myRecords.bw.edu under Financial Aid > Required Financial Aid Documents.

NON-TAX FILING PARENTS AND INDEPENDENT STUDENTS: Each non-tax filing parent and independent student who earned income in 2018 **must submit all W-2 and 1099 forms received for the 2018 tax year.** If you do not have copies, contact your place of employment. Non-filers will also require the submission of a "Verification of Non-filing" from the IRS dated on or after October 1, 2019 attesting that he/she did not file a 2018 IRS income tax return. "Verification of Non-filing" may be ordered by submitting IRS Form **4506-T and checking box 7.** The form is available at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>.

Section 4. Certification. By signing this worksheet, I (we) certify that all information reported is complete and correct. **Warning:** If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Student signature: _____ Date: _____

Parent signature (dependent students only): _____ Date: _____