IOWA STATE UNIVERSITY

**Office of Student Financial Aid**

0210 Beardshear Hall
515 Morrill Road
Ames, IA 50011-2103

515 294-2223
515 294-3622 FAX
financialaid@iastate.edu

**Dependent Student**

## 2017-2018 Institutional Verification Form (Student)

Your Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification (CFR Title 34, Part 668). In this process, Iowa State University will be comparing information from your FAFSA with copies of 2015 Federal Tax Return transcripts, W-2 forms or other financial documents. If there are differences between your FAFSA information and your verification documents provided, the Office of Student Financial Aid may make corrections to your FAFSA using the information provided in the verification process.

## Student Information

_____ _____

Last Name First Name Middle Initial University ID

## Student's Tax Forms and Income Information

| CHECK ONE | IF YOU: | YOU MUST: |
|---|---|---|
| ☐ | USED the IRS Data Retrieval Tool to transfer 2015 tax data to the FAFSA and made no changes to the information after uploaded. | Complete this Verification Worksheet and return it to our office.<br>(You DO NOT NEED to provide a copy of your IRS Tax Return Transcript at this time.) |
| ☐ | DID NOT (or could not) transfer 2015 income information to the FAFSA using the IRS Data Retrieval Tool. | Complete this Verification Worksheet and return it to our office **and** attach a copy of your official **2015 IRS Tax Return Transcript, not an Account Transcript**.<br>http://www.financialaid.iastate.edu/forms/?doc=5118 |
| ☐ | DID NOT work and WILL NOT file a 2015 Federal Tax Return. | Complete this Verification Worksheet and return it to our office. List your source of income (i.e. Disability, pension, etc.) **Source**:_____<br>**Proof of non-filing will be required** www.financialaid.iastate.edu/forms/?doc=5817 |
| ☐ | Filed a foreign return or had foreign income | Complete this Verification Worksheet and return it to our office. Provide an English translation of your foreign financial documents. If you filed a Puerto Rico tax return, provide a signed copy of the 2015 Puerto Rico 1040 tax return (does not need to be translated). |
| ☐ | WORKED, but NOT REQUIRED TO FILE a 2015 Federal Tax Return. | Complete this Verification Worksheet and return it to our office.<br>**Attach copies of all your 2015 W-2 forms**.<br>List below every employer even if the employer did not issue a W-2.<br>**Proof of non-filing will be required** www.financialaid.iastate.edu/forms/?doc=5817 |

| Student's Employer Name | 2015 Amount Earned | IRS W-2 Issued? Y/N |
|---|---|---|
| | $ | Yes☐ No☐ |
| | $ | Yes☐ No☐ |
| | $ | Yes☐ No☐ |
| | $ | Yes☐ No☐ |

**Exception:**
**Amended** Tax Filers:
If you filed, or will file an amended 2015 Federal Tax Return, you must submit a copy of your original Tax Return Transcript as well as a signed copy of your amended Federal Tax Return (IRS 1040-X) even if you used the IRS Data Retrieval Tool. The IRS Data Retrieval Tool does not reflect the amended return information.

## W-2 Information

Were you issued 2015 W-2(s)? Yes ☐ No ☐

Are amounts listed in Box 12, 12a-12d? Yes ☐ No ☐

If yes, review all codes in box(es) 12,12a-12d on the W-2. List below Box number (#), code and dollar amount ($):

Box# _____ Code_____ $_____ Box#_____ Code _____ $ _____

Box# _____ Code_____ $_____ Box#_____ Code _____ $ _____

## Additional Student Financial Information

If your answer is zero or does not apply, enter 0 (zero). **Do not leave blank.**

| | |
|---|---|
| Taxable earnings from Federal Work-Study.<br>**Work-Study College Name: _____** | $ |
| Earnings from work under a cooperative education program offered by a college.<br>**College Name: _____** | $ |
| Annual child support **received** for all children. Do not include foster care or adoption payments. | $ |
| List housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).<br><br>**For members of the military:**<br>Do not include BAH or the value of on-base military housing.<br>Do include BAS. | $ |
| List other untaxed income not reported, such as workers' compensation, disability, money paid on your behalf by someone other than a parent (i.e. grandparent), veterans noneducation benefits, Health Savings Account (IRS Form 1040 Line 25), etc.<br><br>**Do not include** student financial aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.<br><br>**List source(s) of other untaxed income:_____** | $ |

## Signature

By signing this worksheet, I certify that all the information reported is complete and correct. I understand if I purposely give false or misleading information on this worksheet, I may be fined up to $20,000, sent to prison, or both. I am also granting the Office of Student Financial Aid permission to update the FAFSA through the Federal Student Aid online correction tool to match the values found on this and other verification documents you have or will provide.

_____ _____ _____

Student Signature **(in blue or black ink)** University ID Date