

2021-2022 Independent Student Verification Form

PART I: Student (and Spouse if married) Information

Student Name: _____ UMass Spire ID: _____

Did you (or spouse if married) file a 2019 Federal Income Tax Return?

YES ☐ I (and my spouse if married) filed a 2019 Federal Income Tax return. **Do one of the following:**

1. Use the IRS Data Retrieval Tool (DRT) to update yours and (spouse if married) FAFSA with 2019 income information. Or
2. Submit ONE of the following documents to Financial Aid Services:
 - A 2019 Tax Return Transcript obtained from the IRS. Or
 - A Signed copy of 2019 Federal income tax return (1040) including all schedules filed.

NO ☐ I (and my spouse if married) did not file a 2019 Federal Income Tax Return and was not required to file a 2019 Federal income tax return. **Submit a 2019 Verification of Nonfiling obtained from the IRS for you and spouse if married.**

Check one and complete information below:

- ☐ I did not work and had no income earned from work in 2019
- ☐ I was employed and earned income from work in 2019. I am listing below the names of employer(s), amount(s) earned from each employer, and indicating if a W-2 or equivalent form was issue.

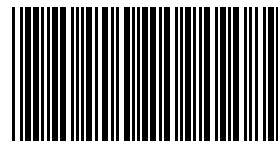
Student		Spouse, if married	
Name of Employer:	Amount Earned:	Name of Employer:	Amount Earned:
_____ \$ _____	W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No	_____ \$ _____	W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No
_____ \$ _____	W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No	_____ \$ _____	W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No
Submit copies of all 2019 W-2 forms.		Submit copies of all 2019 W-2 forms.	

NOTICE: Any financial aid awarded prior to verification is tentative. Financial Aid Services has the right, after reviewing your verification information, to change or cancel your award. Changes in funding, administrative/technical errors, changes in application information, enrollment status or reclassification in residency will affect your financial aid award and may result in a revised financial aid award.

How to obtain 2019 Tax return transcripts or 2019 Verification of Nonfiling from the IRS:

Transcript or Verification of Nonfiling are generally received within 10 business days from the IRS's receipt of the request.

- **Get Transcript by Mail** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get transcript by Mail." **Request the "Return Transcript."**
- **Get Transcript Online** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." **Request the "Return Transcript"** and follow instructions to set up an account.
- **Automated Telephone Request** – Call 1-800-908-9946.
- **Paper Request Form** – Complete IRS Form 4506T-EZ or IRS Form 4506-T. This form is also available at umass.edu/umfa/forms



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Student Name: _____

UMass Spire ID: _____

PART II: Household Information:

- Line 1: List yourself
- Line 2: List your spouse if married and living together
- Lines 3-7: List your children if you will provide **more than half** of their support between July 1, 2021 through June 30, 2022
- Other people, only if now live with you and you provide and will continue to provide **more than half of their support** through June 30, 2022

Full Name of Household Member	Age	Relationship	Check Yes or No If you pay more than half of financial support for the people listed.	Name of college attending for 2021-2022. Must be enrolled at least half time
1.		Student	N/A	UMASS Amherst
2.		Spouse		
3.			<input type="checkbox"/> Yes <input type="checkbox"/> No	
4.			<input type="checkbox"/> Yes <input type="checkbox"/> No	
5.			<input type="checkbox"/> Yes <input type="checkbox"/> No	

If additional space is needed, attach a separate page.

List Other Income Received in 2019:

Alimony or spousal support received in 2019 and <u>not</u> reported on tax return:	\$ _____
Child Support received in 2019:	\$ _____
Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on 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).	\$ _____
Military, clergy, or other housing, food, or living allowance payment received (including cash payments and cash value of benefits):	\$ _____
Amount of veterans non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances:	\$ _____
Other untaxed income- list sources of income (e.g. workers' compensation, disability, etc.):	
Source: _____	\$ _____
Source: _____	\$ _____

PART III: Certification and Signatures

I certify that all information submitted with, and written on this application, is complete, accurate, and corrections may be made based on data provided, and that if I purposely give false or misleading information on this worksheet, I may be fined, sentenced to prison, or both. I also certify that any federal or state financial aid funds I may receive will only be used to pay for educational expenses related to my attendance at the University of Massachusetts Amherst for 2021-2022 academic year.

Student Signature: _____ Date: _____

Fax completed signed form to: 413-545-1700
or email to: fadocs@umass.edu

(Attachments must be a standard image file, or in one of the following file formats: .doc, .docx, .pdf)

