

2020-2021 Independent Verification Form

University of
Massachusetts
Amherst BE REVOLUTIONARY

Financial Aid Services
243 Whitmore Administration Building
181 Presidents Drive, Amherst, MA 01003

Phone: 413-545-0801 Fax: 413-545-1700
Email: finaid@finaid.umass.edu

PART I: Student and Spouse (if married) Information

Student Name: _____ Spire ID: _____

	Student	Spouse
Did you file a 2018 Federal Income Tax Return?	<input type="checkbox"/> Yes <input type="checkbox"/> No , I did not file and was not required to file a 2018 income tax return*	<input type="checkbox"/> Yes <input type="checkbox"/> No , I did not file and was not required to file a 2018 income tax return*

*Non tax filers are required to submit a Verification of Nonfiling obtained from the IRS.

If you or spouse filed a 2018 Federal Income Tax return do one the following:

1. Use the IRS Data Retrieval Tool (DRT) to update yours or spouse (if married) FAFSA with 2018 income information. Or
2. Submit ONE of the following documents to Financial Aid Services:
 - A 2018 Tax Return Transcript obtained from the IRS. Or
 - A Signed copy of 2018 income tax return (1040) including all schedules filed

If you or spouse did not file a 2018 Federal Income Tax Return:

- **Submit a 2018 Verification of Nonfiling obtained from the IRS for you and spouse if married, and complete the information below:**

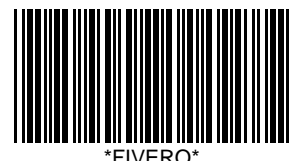
- ☐ I did not work and had no income earned from work in 2018.
- ☐ I was employed and earned income from work in 2018. Complete the information below.

Student		Spouse	
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 2018 W-2 forms.		Submit copies of all 2018 W-2 forms.	

How to obtain 2018 Tax return transcripts or 2018 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: _____

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, 2020 through June 30, 2021
- 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, 2021

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 2020-2021. 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 2018:

Alimony or spousal support received in 2018 and <u>not</u> reported on tax return:	\$ _____
Child Support received in 2018:	\$ _____
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: _____	\$ _____

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.

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 2020-2021.

Student Signature: _____ **Date** _____

