

# Independent Student Verification Form

## PART I: Student (and Spouse if married) Information

Student Name: \_\_\_\_\_ UMass Spire ID: \_\_\_\_\_

Did you (or your spouse if married) file a 2021 Federal Income Tax Return?

YES  I (and my spouse if married) filed a 2021 Federal Income Tax return.

**Do one of the following:**

1. Use the IRS Data Retrieval Tool (DRT) to update your FAFSA with 2021 income information. Or
2. Submit ONE of the following documents to Financial Aid Services:
  - A 2021 Record of Account Transcript obtained from the IRS. Or
  - A Signed copy of 2021 Federal income Tax Return (Form 1040) including all schedules filed.

NO  I and spouse if married did not file and were not required to file a 2021 Federal Income Tax Return.

**Submit a 2021 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 2021
- I was employed and earned income from work in 2021. I am listing below the names of employers, amounts earned from each employer, and indicating if a W-2 or equivalent form was received.

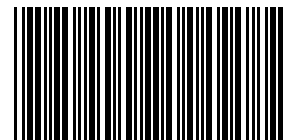
Student		Spouse, if married	
Name of Employer:	Amount Earned:	Name of Employer:	Amount Earned:
_____ \$ _____	W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No	_____ \$ _____	W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No
_____ \$ _____	W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No	_____ \$ _____	W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No
Submit copies of all 2021 W-2 forms.		Submit copies of all 2021 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 2021 a Record of Account Transcripts or Verification of Nonfiling from the IRS:

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

- **Get Transcript by Mail** – Go to [www.irs.gov](http://www.irs.gov), click “Get Your Tax Record.” Click “Get transcript by Mail.” Request the “Record of Account Transcript”.
- **Get Transcript Online** – Go to [www.irs.gov](http://www.irs.gov), click “Get Your Tax Record.” Click “Get Transcript Online.” Follow instructions to set up an account. **And** Request the “Record of Account Transcript”.
- **Automated Telephone Request** – Call 1-800-908-9946.
- **Paper Request Form** – Complete IRS Form 4506-T. This form is also available for download at [umass.edu/financialaid](http://umass.edu/financialaid)



# Independent Student Verification Form

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 and other people if you **will provide more than half of their financial support between July 1, 2023 through June 30, 2024**

Full Name of Household Member	Age	Relationship	Check Yes or No If you pay <b>more than half of financial support</b> for the people listed.	Name of college attending for 2023-2024. 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	
6.			<input type="checkbox"/> Yes <input type="checkbox"/> No	

If additional space is needed, attach a separate page.

## List Other Income Received in 2021:

Child Support received in 2021:	\$ _____
Alimony or spousal support received in 2021 and <u>not</u> reported on tax return:	\$ _____
Money received, or paid on your behalf by other person or parent not listed on FAFSA.	\$ _____
Untaxed portions of IRA distributions and pensions from IRS Form 1040—(lines 4a + 5a) minus (lines 4b + 5b)	\$ _____
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 2023-2024 academic year.

Student Signature: \_\_\_\_\_ Date \_\_\_\_\_

Fax completed form to: **413-545-1700** or  
 Secure Document Upload at: **umass.edu/financialaid/upload**

