



Independent Student Verification Form

Name: _____

UMass SPIRE ID: _____

PART I: Student (and Spouse if married) Information

Did you (or your spouse if married) file a 2022 Federal Income Tax Return?

YES- *I (and my spouse if married) filed a 2022 Federal Income Tax return.*

Submit ONE of the following documents to Financial Aid Services:

- **A 2022 Tax Return Transcript obtained from the IRS.** Or
- **A Signed copy of 2022 Federal income Tax Return (Form 1040) including all schedules filed.**

NO- *I (and my spouse if married) did not and were not required to file a 2022 Federal Income Tax Return.*

Check one and complete information below:

I did not work and had no income earned from work in 2022.

I was employed and earned income from work in 2022. 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 received.

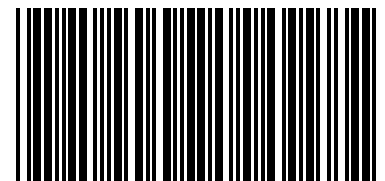
Student		Spouse, if married	
Name of Employer:	Amount Earned:	Name of Employer:	Amount Earned:
_____ \$_____ W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No		_____ \$_____ W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No	
_____ \$_____ W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No		_____ \$_____ W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Submit copies of all 2022 W-2 forms.		Submit copies of all 2022 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 2022 Tax Return Transcripts 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, 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." Follow instructions to set up an account. **And** Request the "Return 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





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PART II: Student Family Information

- Line 1: List yourself
- Line 2: List your spouse if married and living together
- Lines 3-6: List your children and other people only if you will provide more than half of their support between July 1, 2024 and June 30, 2025.

Full Name of Household Member	Age	Relationship	Parent check Yes or No If you pay more than half of financial support for the people listed.	Name of college attending for 2024-2025. 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 2022:

Amount of Child Support received for any of your children:	\$ _____
Other untaxed income- list sources of income (e.g. workers' compensation, disability, etc.):	
Source: _____	\$ _____
Source: _____	\$ _____

PART IV: 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 the 2024-2025 academic year.

Student Signature: _____ Date _____

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

