

Dependent Student Verification Form

Financial Aid Services
Academic Year 2025-2026
Fax: 413-545-1700
Phone: 413-545-0801
Email: finaid@umass.edu

Student Name: _____ UMass SPIRE ID: _____

SECTION I: To Be Completed by the Student

Did you file a 2023 Federal Income Tax Return?

- ☐ **YES- I filed a 2023 Federal Income Tax return and I consented** to use the FAFSA Direct Data Exchange (FDDX) to retrieve and transfer 2023 income information into my FAFSA.
- ☐ **YES- I filed a 2023 Federal Income Tax return but did not consent or used** the FAFSA Direct Data Exchange (FDDX) to retrieve and transfer 2023 income information into my FAFSA.

Submit **ONE** of the following documents to Financial Aid Services:

- A 2023 Tax Return Transcript obtained from the IRS. Or
- A Signed copy of 2023 Federal income Tax Return (Form 1040) including all schedules filed.

- ☐ **NO- I did not and was not required to file a 2023 Federal Income Tax Return.**

✓ Check one and complete information below:

- ☐ I did not work and had no income earned from work in 2023
- ☐ I was employed and earned income from work in 2023. 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.

Name of Employer	Amount Earned	W-2 Received? Yes or No
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____

Submit copies of all 2023 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 2023 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".
- **Paper Request Form** – Complete IRS Form 4506-T - This form is also available for download at umass.edu/financialaid
- **Automated Telephone Request** – Call 1-800-908-9946.



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Student Name: _____ UMass SPIRE ID: _____

SECTION II: To Be Completed by the Parent:

Name of Parent completing this Section: _____ Email Address: _____

Parent(s) Family Information:

Provide information for family members living in your household. Include: the student, even if they don't live with you. The parent(s), and/or step-parent. Unmarried parents living together and same-sex parents who were legally married in any jurisdiction.

Include other children and people **only if you will provide more than half of their support between July 1, 2025 and June 30, 2026.**

Full Name of Household Member	Age	Relationship	Parent check Yes or No If you pay <u>more than half of financial support</u> for the people listed.
1.		Student	N/A
2.		Parent 1	
3.		Parent 2/Stepparent	
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
7.			<input type="checkbox"/> Yes <input type="checkbox"/> No
8.			<input type="checkbox"/> Yes <input type="checkbox"/> No
9.			<input type="checkbox"/> Yes <input type="checkbox"/> No
10.			<input type="checkbox"/> Yes <input type="checkbox"/> No

SECTION III: Parent Income Information: This section apply to each parent included in household above.

Did the Parent file a 2023 Federal Income Tax Return?

- ☐ **YES- Parents filed a 2023 Federal Income Tax return and consented to use the FAFSA Direct Data Exchange (FDDX)** to retrieve and transfer 2023 income information into my FAFSA.
- ☐ **YES- Parents filed a 2023 Federal Income Tax return but did not consent or used the FAFSA Direct Data Exchange (FDDX)** to retrieve and transfer 2023 income information into my FAFSA.

Submit **ONE** of the following documents to Financial Aid Services:

- A 2023 Tax Return Transcript obtained from the IRS.
- A Signed copy of parent's 2023 Federal Income Tax Return (IRS Form 1040) including all schedules filed.

- ☐ **NO- Parents did not file and were not required to file a 2023 Federal Income Tax Return.**
Complete the next section



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Section III: Parents that Did not File a 2023 Tax Return Must Complete this Section:

✓ Check one and complete below:

- ☐ Parents did not work and had no income earned from work in 2023
- ☐ Parents was/were employed and earned income from work in 2023. Listed below are the names of employers, amounts earned from each employer, and indicating if a W-2 or equivalent form was received.

Name of Employer:	Parent 1 Amount Earned:	Parent 2 Amount Earned	W-2 Received? Yes or NO
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____

Submit copies of all 2023 W-2 forms.

Did you received other income and resources that supported the household during 2023 tax year? If so, please list below the source and amounts received. If no other sources of income, write "NONE".

Source of Income (Example: Child Support)	Parent 1 Amount	Parent 2 Amount
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

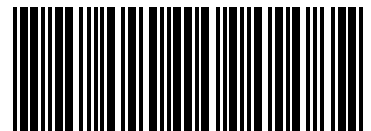
Certification and Signatures

We 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 2025-2026 academic year.

Parent Signature: _____ Date _____

Student Signature: _____ Date _____

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



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