

# Independent Student Verification Form

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

Student Name: \_\_\_\_\_ UMass SPIRE ID: \_\_\_\_\_

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

### Did you (or your spouse if married) file a 2023 Federal Income Tax Return?

- ☐ **YES-** I (and my spouse if married) **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-** I (and my spouse if married) **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 (and my spouse if married) **did not and were not required to file** a 2023 Federal Income Tax Return.

✓ Check one and complete information below:

- ☐ I (and my spouse if married) did not work and had no income earned from work in 2023.
- ☐ I (and my spouse if married) were 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.

### Student

Name of Employer:	Amount Earned	W-2?
_____	\$ _____	Yes <input type="checkbox"/> No <input type="checkbox"/>
_____	\$ _____	Yes <input type="checkbox"/> No <input type="checkbox"/>

Submit copies of all 2023 W-2 forms.

### Spouse, if married

Name of Employer:	Amount Earned:	W-2?
_____	\$ _____	Yes <input type="checkbox"/> No <input type="checkbox"/>
_____	\$ _____	Yes <input type="checkbox"/> No <input type="checkbox"/>

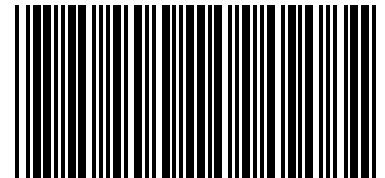
Submit copies of all 2023 W-2 forms.

**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](http://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](http://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](http://umass.edu/financialaid)
- **Automated Telephone Request** – Call 1-800-908-9946.



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Student Name: \_\_\_\_\_ UMass SPIRE ID: \_\_\_\_\_

## SECTION 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, 2025 and June 30, 2026.

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

If additional space is needed, attach a separate page.

Did you receive 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**".

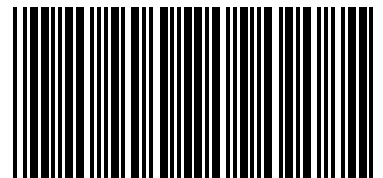
Source of Income (Example: Child Support)	Student Amount	Spouse Amount
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

## 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](https://umass.edu/financialaid/upload)



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