

Financial Aid, Student Employment & Military Education Benefits

Mellencamp Hall, Room 162, P.O. Box 469, Milwaukee, WI 53201-0469 Phone: (414) 229-4541 Fax: (414) 229-5699 Email: <u>finaid@uwm.edu</u>

2023-24 Independent Verification Worksheet

IMPORTANT: PLEASE SUBMIT ALL DOCUMENTS AT THE SAME TIME AND ANSWER ALL QUESTIONS. INCOMPLETE AND/OR CONFLICTING DOCUMENTS WILL BE RETURNED AND WILL RESULT IN PROCESSING DELAYS.

Section 1 – Student Information (Please print clearly)
--	-----------------------

STUDENT NAME:	STUDENT ID #:

Section 2 – Family Information (Please read instructions before completing)

Please list the people in your household, including:

- yourself, and your spouse (if married),
- your children, if you will provide more than half of their support between July 1, 2023, and June 30, 2024, and
- other people if: they now live with you, and you provide more than half of their support and will continue to provide more than half of their support between **July 1**, **2023**, **and June 30**, **2024**.

In the spaces below, write the names, ages, and relationship to you for all household members. If you need more space, attach a separate sheet. Also, for the same time period of **July 1, 2023, and June 30, 2024**, write in the name of the college for any household member listed who will be attending college at least half-time in a program that leads to a college degree or certificate.

Example: John Smith	34	Spouse	UW - Milwaukee
Example: Michelle Smith	5	Daughter	

Full Name	Age	Relationship to Student	College (Please List Full Name)
		Self	UW - Milwaukee

Section 3 – Student/Spouse Income Information (Please read instructions before completing)

Check only **ONE** box in **either A or B**.

- A. If you and spouse (if married) **filed** a 2021 federal tax return, check one box in Section A.
- B. If you and/or spouse **did not file** a 2021 federal tax return, complete Section B for Non-Tax Filer.

A. 2021 Student/Spouse Tax Filer

I already completed the **FAFSA IRS Data Retrieval (DRT)** process. For more information on how to complete the DRT process: <u>uwm.edu/taxes</u>.

I have attached my 2021 IRS Tax Return Transcript *or a* **SIGNED** copy of 2021 Federal Tax Return **including Schedules 1, 2, and 3 if applicable.**

I filed a **2021 amended return (1040X)**, have an extension, filed a foreign tax return, or cannot obtain a tax transcript due to IRS identity theft.

- If you amended your return, we would need a copy of your **SIGNED** 2021 IRS **1040X** including schedules 1, 2, and 3 if applicable or an IRS Record of Account Transcript that can be obtained at IRS.gov. We also need a copy of your **ORIGINAL SIGNED** 2021 federal tax return (before it was amended) including schedules 1, 2, and 3 if applicable.
- If you were a victim of identity theft, go to wwm.edu/taxes for documentation you will need to provide to us.

B. 2021 Student/Spouse Non-Tax Filer

Check only **ONE** box below **if you (and/or spouse if married) did not file** a 2021 federal tax return. *Note, you must also submit an IRS Verification of Non-filing letter. Instructions on how to obtain this can be found here: www.edu/taxes.

I did not earn any income from work in 2021.

I did earn income from work in 2021. I did not and was not required to file a 2021 Federal Income Tax Return per the IRS. **You must list all income** sources/amounts below and attach all 2021 W-2 and 1099 MISC forms.

Individual's Name	Name of Employer	Income in 2021

I did earn income from work in 2021, but do not have any W-2s or 1099 MISC form(s) (Ex. babysitting job, lawn job). I certify that I am not considered self-employed, and I did not and was not required to file a tax return.

	Individual's Name	Name of Employer/Job Performed	Income in 2021
Ī			

Section 4 – Student and Spouse (if married) Signatures

By signing this worksheet, I/we certify the information reported is correct to the best of our knowledge. If the Department of Financial Aid notices a discrepancy, I/we understand corrections to the FAFSA will be submitted directly to the U.S. Department of Education. Additionally, I/we understand that any such corrections may also warrant an adjustment to any financial aid that has already been offered for the 2023-24 academic year.

NOTE: Signatures cannot be typed or stamped. Must be signature.

This form is only required if you completed Section 3-B but were unable to obtain a Verification of Non-Filing Letter directly from the IRS

Verification of Non-Filing Worksheet

Individuals who **did not file** a federal tax return are required to obtain a verification of non-filing letter from the IRS. **However**, if you and/or your spouse were unable to obtain a verification of non-filing letter from the IRS, you can complete the information below certifying that:

- You and/or your spouse attempted to obtain a verification of non-filing letter from the IRS, but were unsuccessful; **and**
- You and/or your spouse have not and were not required to file a federal income tax return for 2021.

If a non-filer had earnings from work, W-2s from each source of income must be provided.

ent Name:	Student ID#	::	
	certify that I attempted t	o obtain a verification of non-filing	
(Non-Filer's Printed Na	me)		
er from the IRS by the following	ng means (please mark only ONE b	pox):	
I attempted to obtain	I attempted to obtain a verification of non-filing letter from the IRS by submitting IRS form		
4506-T to the IRS. I w	4506-T to the IRS. I waited at least 10 days and have not received a response back.		
	nave a Social Security Number, a Ta n Number, therefore am unable to r		
Other (please explain	Other (please explain your attempt to obtain the non-filing letter):		
ONE of the fellowin	AND		
ase check ONE of the following	g below:		
I certify that I did not	file and was not required to file a 20	021 federal income tax return.	
I was not employed in	2021. I did not earn any income in	2021 and have no W-2s to provid	
Listed below is informa	file and was not required to file a 20 ation about the income I earned in 2 h source of employment income	2021, along with attached copies	
Individual's Name	Name of Employer	Income Earned in 2021	
a-Filer's Signature:	Date:		