LESLEY UNIVERSITY FINANCIAL AID
DEPENDENT Verification Worksheet
2014-2015

Your application for financial aid has been selected for a process called "verification." Through the verification process, the Office of Financial Aid will corroborate information submitted on your 2014-2015 Free Application for Federal Student Aid (FAFSA) with information you submit on this verification worksheet. Please reference the accompanying missing item letter or email for a complete list of any other required verification documents, which may include copies of your and your parents' 2013 IRS Tax Return Transcript, and possibly other financial documentation as requested. U.S. Department of Education policy indicates the Office of Financial Aid has the legal authority to require you to submit the indicated information prior to providing you with a financial aid award. Please contact the Office of Financial Aid at 1-800-999-1959, ext. 8760 if you would like assistance completing this form.

A. Student Information

Last Name (Please Print)	First Name	Middle Initial	Lesley ID#	OR xxx-xx- Last 4 digits of Soc Sec No.
Address (include apartment number)			Date of Birth	
City	State	Zip Code	Phone Number (include area code)	
Email Address			Cell Number (include area code)	

Important Note: The instructions below apply to each parent included in the household. Please notify the Office of Financial Aid if your parents filed separate IRS income tax returns for 2013 or had a change in marital status after the end of the 2013 tax year on December 31, 2013.

INSTRUCTIONS: *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of the FAFSA on the Web at FAFSA.ED.GOV* because in most cases, no further documentation beyond this form is needed to verify 2013 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

In most cases, for electronic tax filers, 2013 IRS income tax return information for the IRS DRT is available within two weeks after the 2013 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2013 IRS paper income tax returns, the 2013 IRS income tax information is available for the IRS DRT within 8 - 11 weeks after the paper return has been received by the IRS.

Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2013 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:

- A copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2013
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2013, and
- A copy of the IRS form W-2 for each source of employment income received for tax year 2013 and, if self employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2013.

Individuals Who Filed an Amended IRS income Tax Return

If an individual filed an amended IRS income tax return for tax year 2013, provide both of the following:

- A signed copy of the original 2013 IRS income tax return that was filed with the IRS or a 2013 IRS Tax Return Transcript; and
- A signed copy of the 2013 IRS Form 1040X, "Amended U.S. individual income Tax Return" that was filed with the IRS.

Individuals Who Were Victims of IRS Identity Theft

A victim of IRS identity theft who is not able to obtain a 2013 IRS Tax Return Transcript or use the IRS DRT must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer's identity, the IRS will provide, by U.S. Postal Service, a printout of the filer's 2013 IRS income tax return information.

Individuals Who Filed Non-IRS income Tax Returns

An individual filed or will file a 2013 income tax return with Puerto Rico, another U.S. territory or with a foreign country, must provide a signed copy of that 2013 income tax return.

B. Family Information

In the table below, write the names of all people in your parents' household.

If your parents are divorced or separated, include only your custodial parent's household information.

1. Include **your name** (student) and **the name(s) of your parent(s). Please include both student's legal (biological or adoptive) parents if the parents live together, regardless of marital status or gender of parents.**
2. Include your parents' other children, even if they do not live in your household, if
   a. your parent(s) will provide more than half of their support from July 1, 2014 to June 30, 2015; or
   b. if the children will be required to provide parental information when applying for federal student aid.
3. Include other people if they now live with your parent(s), and your parent(s) provide(s) more than half of their support and will continue to provide more than half of their support from July 1, 2014 to June 30, 2015.
4. Also include the name of the college (or anticipated college of attendance) for any household member, **excluding your parents**, who will be attending college at least half-time (6 credit hours or more) from July 1, 2014 to June 30, 2015, and will be enrolled in a degree or certificate program. If you require more space, attach a separate page.

Indicate the marital status of your legal (biological and/or adoptive) **parent(s) regardless of parent's marital status or gender, if the parents live together** (check one):

☐ Never Married ☐ Unmarried and both parents living together ☐ Married or Remarried ☐ Divorced or Separated ☐ Widowed

Name of Family/Household Member (please include both of dependent student's legal (biological or adoptive) parents if the parents live together, regardless of marital status or gender of the parents)	Relationship to Student	Age	College Enrollment for 2014-2015* (Please anticipate college if planning to enroll. Do not include Graduate programs)	Will Enroll at Least Half-Time? (6 credit hours or more, anticipate if planning to enroll)		Expected Year of Graduation (Please anticipate if enrolled)
				Yes	No	
1. ***Student Applicant's Name:*** _____	***Self***	_____	***Lesley University***	_____	_____	_____
2.						
3.						
4.						
5.						
6.						
7.						

*College enrollment may be subject to verification.

C. Student/Parent Income Information

In general, once you earn the following minimum gross income amounts, the law requires you to file a federal tax return with the IRS. Please check your filing status. If you made more than the amounts listed below you must file a 2013 federal tax return.

Filing Status	Income
Single	$10,000
Head of Household	$12,850
Qualifying Widow (with dependent child)	$16,100

Filing Status	Income
Married Filing Jointly	$20,000
Married Filing Separately	$ 3,900
Single Dependent (claimed on parents' federal tax return)	$ 6,100

Check the box that applies: **PARENT**

☐ The parent(s) have used the IRS DRT in FAFSA on the Web to transfer 2013 IRS income tax return information into the student's FAFSA.

☐ The parents are unable or choose not to use the IRS DRT in FAFSA on the Web, and instead will provide Lesley University a 2013 IRS Tax Return Transcript(s). [To obtain a 2013 IRS Tax Return transcript, go to IRS.GOV and click on the "Order a Return or Account Transcript" link. Make sure to order the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript". If the parents filed separate 2013 income tax returns a 2013 IRS Tax Return Transcripts must be provided for both].

☐ The parent(s) did not file and are not required to file a 2013 Federal Income Tax return. Below are listed the names of all employers, the amount earned from each in 2013 and whether an IRS W-2 is provided (please provide copies of all W-2 forms provided by employers).

Employer's Name 2013 Amount Earned IRS W-2 Provided

_____

_____

Check the box that applies: **STUDENT**

☐ The student has used the IRS DRT in FAFSA on the Web to transfer 2013 IRS income tax return information into the FAFSA.

☐ The student was unable or chose not to use the IRS DRT in FAFSA on the Web, and instead will provide Lesley University a 2013 IRS Tax Return Transcript(s). [To obtain a 2013 IRS Tax Return transcript, go to IRS.GOV and click on the "Order a Return or Account Transcript" link. Make sure to order the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript"].

☐ The student did not file and is not required to file a 2013 Federal Income Tax return. Below are listed the names of all employers, the amount earned from each in 2013, and whether an IRS W-2 is provided (please provide copies of all W-2 forms provided by employers).

Employer's Name 2013 Amount Earned IRS W-2 Provided

_____

_____

D. Certification

By signing this form, I (we) certify all information reported to the Office of Financial Aid is complete and accurate.
At least one parent must sign this form.

_____ _____

Student's Signature Date Parent's Signature Date

_____ _____OR xxx-xx-_____

Last Name (Please Print) First Name Lesley ID# Last 4 digits of Soc Sec No.

Please complete, sign and return this form by faxing it to 617.349.8667 or mailing it to the address listed below. *Questions?* Call us at (800) 999-1959, ext. 8760 or send an email to sfs@lesley.edu .