LESLEY UNIVERSITY FINANCIAL AID
INDEPENDENT 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 be corroborating 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 both your and your spouse's (if you are married) 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 you would like assistance completing this form.

A. Student Information

Last Name (Please Print)	First Name	Middle Initial	_____ OR xxx-xx-_____ Lesley ID#	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 Phone Number (include area code)	

INSTRUCTIONS: The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse 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.

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 IRA 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 those 2013 income tax return.

B. Family Information

In the table below, write the names of all the members of your household:

1. Include **your name** and **your spouse** (if you are legally married regardless of gender).
2. Include your children if you will provide more than half of their support from July 1, 2014 to June 30, 2015, even if the children do not live with you.
3. Include 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 through June 30, 2015.
4. Also**, include the name of the college for any household member who will be attending college at least half-time** (at least 6 credit hours) from July 1, 2014 to June 30, 2015 and will be enrolled in a degree, diploma or certificate program at an eligible postsecondary education institution. If you require more space, attach a separate page.

Indicate ***your*** marital status (check one):

Single ☐ Married (includes remarried) regardless of gender ☐ Separated/Divorced ☐ Widowed ☐

Please Note: If you were married (regardless of gender) on the day you filed your Free Application for Student Aid (FAFSA) you must include a copy of your spouse's 2013 Tax Return Transcript even if you were not married during the 2013 tax year.

Name of Family Member	Relationship to Student	Age	College Enrollment for 2014-2015*	Will Enroll at Least Half-time?* Yes	No	Expected Year of Graduation
1. ***Student Applicant's Name:*** _____	***Self***	_____	***Lesley University***	_____	_____	_____
2.						
3.						
4.						
5.						
6.						
7.						
8.						

*College enrollment may be subject to verification.

C. Student/Spouse Tax Forms and Income Information

Check the box that applies:

☐ 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 chooses 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 student and spouse filed separate 2013 income tax returns, 2013 IRS Tax Return Transcripts must be provided for both].

☐ 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

_____

_____

_____

In general, once you earn the following minimum gross income amounts, IRS tax law requires you to file a Federal Income Tax Return. If you earned more than the figures listed below you are required to file a 2013 Federal Income 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

D. Certification

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

_____ _____

Student's Signature Date Spouse's Signature (if student is married) Date

_____ _____ OR xxx-xx-_____

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