



2022-2023 Independent Verification Worksheet Federal Student Aid Programs

V1/V5

Your 2022–2023 Free Application for Federal Student Aid (FAFSA) was selected by the Department of Education for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must submit the completed form and other required documents to the Office of Student Financial Services. Please include your name and student ID number on all documents. The office may ask for additional information if necessary. If you have questions about verification, contact the Office of Financial Aid as soon as possible so that your financial aid will not be delayed.

A. Independent Student's Information (please print): (Sections A - D must be completed)

Student's Last Name	Student's First Name	Student's M.I.	/
			Student's Social Security Number AND Student Number
Student's Street Address (include apt. no.)			Student's Date of Birth
City	State	Zip Code	Student's Email Address
Student's Home Phone Number (include area code)			Student's Alternate or Cell Phone Number

B. Independent Student's Family Information

List the people in your household including:

- Yourself and your spouse if you are married.
- Your children, and/or step-children, if you will provide more than half of their support from July 1, 2022, through June 30, 2023 even if they do not live with you, 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 through June 30, 2023.

Write your name on the first line, and then names of all household members in the spaces below. Then, write in the name of the college for any household member who will be attending at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2022 and June 30, 2023. If you need more space, attach a separate page.

FULL NAME	AGE	RELATIONSHIP	COLLEGE	Will be Enrolled at Least Half Time
		SELF	Marion Military Institute	

CHILD SUPPORT PAID – I certify that either I, or my spouse, **paid** child support in 2020. I understand that I may be requested to provide additional documentation of the payment of child support. Do not include child support received in this section. *Fill out the table below. If you need more space, attach a separate page.*

Name of Person Who Paid Support	Name of Person to Whom Child Support Was Paid to	Name of Child for Whom Support Was Paid for	Age of Child	Total Amount of Child Support Paid in 2020

C. Tax Forms and Income Information

Student Check one	IF YOU FILED TAXES...	Spouse Check one																		
<input type="checkbox"/>	I have used the IRS Data Retrieval Tool to retrieve and transfer my 2020 IRS income information into the student's FAFSA. Proceed to Untaxed Income below.	<input type="checkbox"/>																		
<input type="checkbox"/>	I have not used the IRS Data Retrieval Tool when filing the FAFSA on the web. I have attached my 2020 U.S. Tax Return Transcript to this worksheet. Please note that a tax return transcript is not the same as your original 1040 tax filing. To request a <u>Tax Return Transcript</u> , online or by mail, from the Internal Revenue Service go online to www.irs.gov . Make sure to request the "IRS Tax Return Transcript", not the "Tax Account Transcript". Transcripts can be ordered via their Automated Telephone Request service at 1-800-908-9946. If using the Paper Request Form 4506T-EZ or 4506-T, first, send the transcript to your own address, and then turn in a copy with your verification form. Verification cannot be completed until all transcripts are in. Proceed to Untaxed Income below.	<input type="checkbox"/>																		
IF YOU DID NOT FILE TAXES - a non-filers statement from the IRS is required																				
<input type="checkbox"/>	Check here if you and/or your spouse worked, but did not file, and were not required to file, a 2020 Federal Income Tax Return. List the name of all employers and wages received in 2020 below. Attach a separate page if needed. Copies of W2s ARE REQUIRED. Proceed to both Untaxed Income and section D below.	<input type="checkbox"/>																		
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 33%;">Student's Employer(s)</th> <th style="width: 10%;">2020 Wages</th> <th style="width: 10%;">W2 Required</th> <th style="width: 33%;">Spouse's Employer(s)</th> <th style="width: 10%;">2020 Wages</th> <th style="width: 10%;">W2 Required</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td style="text-align: center;">YES</td> <td></td> <td></td> <td style="text-align: center;">YES</td> </tr> <tr> <td></td> <td></td> <td style="text-align: center;">YES</td> <td></td> <td></td> <td style="text-align: center;">YES</td> </tr> </tbody> </table>	Student's Employer(s)	2020 Wages	W2 Required	Spouse's Employer(s)	2020 Wages	W2 Required			YES			YES			YES			YES	
Student's Employer(s)	2020 Wages	W2 Required	Spouse's Employer(s)	2020 Wages	W2 Required															
		YES			YES															
		YES			YES															
<input type="checkbox"/>	Check here if you or both you and your spouse were not employed and had no income earned from work in 2018. A non-filers statement from the IRS is required. Proceed to both Untaxed Income and section D below.	<input type="checkbox"/>																		
Student	2020 UNTAXED INCOME	Spouse																		
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H, and S. Don't include amounts reported in code DD *** Attach W2(s)***	\$																		
\$	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans from IRS Form 1040 Schedule 1 - total of lines 28 + 32	\$																		
\$	Child Support received for all children in your household in 2020 . Do not include foster care, adoption payments, or any amount that was court-ordered but not actually paid. You may be requested to supply documentation.	\$																		
\$	Tax Exempt interest income from IRS Form 1040 (line 2a).	\$																		
\$	Untaxed portions of IRA distributions and pensions from IRS Form 1040 (line 4a minus line 4b). Exclude Rollovers. If negative, enter a zero here.	\$																		
\$	Housing, food, and other living allowance paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.	\$																		
\$	Veteran's non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$																		
\$	Other untaxed income or benefits not reported elsewhere, such as workers compensation, disability benefits, untaxed foreign income, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1- line 25. Don't include foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, SSI, WIA educational benefits, on-base military housing or a military housing allowance, combat pay, or benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$																		
\$	Money received or paid on your behalf (for bills in your name) not reported elsewhere on this form. Include 529 plan that is owned by someone other than your parents (such as grandparent, aunt, or uncle.)	\$																		

D. Household Resources/Documentation of Support (If you reported low or no earned income, this section **must** be completed. Please attach explanation.)

So that we can fully understand a student's family financial situation, please provide information about any other resources, benefits, and other amounts received by the student and any members of the student's household on a separate sheet or attach documentation. Include support received that was not required to be reported on the FAFSA or other forms submitted to the financial aid office. This should include Social Security benefits, financial aid refunds, Federal Work/Study, etc.

E. Sign this Worksheet

By signing this worksheet you are certifying that all the information reported, to qualify for Federal student aid, is complete and correct. Please sign and date the worksheet below.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student

Date

Spouse (optional)

Date

Please note that processing may take 3 – 4 weeks after documents are received especially during peak processing.

MAIL, FAX, OR EMAIL THIS FORM

Marion Military Institute
Office of Financial Aid
1101 Washington Street
Marion, AL 36756

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jwilson@marionmilitary.edu
(334) 683-2383 (Fax)