



2019-2020 Independent Verification Worksheet

Your FAFSA application has been selected for review in a process called “**Verification.**” *Before SUM can award you Federal Student Aid*, the law requires that the information from your FAFSA be compared with Federal IRS tax information as well as other financial documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach all required documents and submit to the SUM Financial Aid Office by Email: fadocs@sum.edu , FAX: 510.567.6125 or US Mail: SUM Financial Aid Office, 1107 Investment Blvd, Suite 290, El Dorado Hills, CA 95762

STUDENT INFORMATION

Last Name	First Name	M.I.	Student ID or last 4 digits of your SS Number
Student’s Email Address	Student’s Phone Number (include Area Code)		Current Address City, State, Zip

Section 2: INCOME VERIFICATION -- Student and Spouse (if married)

A. FOR TAX FILERS: If you and/or your spouse **FILED** a 2017 IRS Income Tax Return and did not use the IRS Data Retrieval Tool on your FAFSA, verify your 2017 tax information by providing a 2017 IRS Income Tax Return through one of these methods: a) Telephone Request - 1-800-908-9946, or b) Go to www.irs.gov and request by mail, or c) Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T.

STUDENT	SPOUSE	
<input type="checkbox"/>	<input type="checkbox"/>	I used the IRS Data Retrieval Tool when completing/updating the 2019-20 FAFSA.
<input type="checkbox"/>	<input type="checkbox"/>	I did not use the IRS DRT, and will provide my 2017 IRS Tax Return.

B. FOR NON-TAX FILERS: If you and/or your spouse **WILL NOT** and **ARE NOT REQUIRED** to file a 2017 IRS Income Tax Return, complete all information requested below and attach all W-2 Forms provided by all employer.

STUDENT	SPOUSE	
<input type="checkbox"/>	<input type="checkbox"/>	I was <u>not</u> employed and had no income earned from work in 2017.
<input type="checkbox"/>	<input type="checkbox"/>	I was employed in 2017 and have listed below the names of all employers, the amount earned from each employer, and whether an IRS W-2 form was provided by my employer(s). <u>I have attached a copy of all 2017 W-2 form(s).</u>

Name of Student’s Employer	Amount Earned in 2017	IRS W-2 Included?
<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2000.00 (example)</i>	<i>Yes (example)</i>
Name of Spouse’s Employer	Amount Earned in 2017	IRS W-2 Included?

Section 3: UNTAXED INCOME & OTHER FINANCIAL INFORMATION – Student and Spouse

Enter zero (-0-) if none received. You may be required to submit W-2s issued by your employer(s).

Student/Spouse	Calendar Year 2017
\$	Payments to tax-deferred pensions and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on W-2 Form Box 12a-12d, with codes D, E, F, G, H, and S.
\$	Child support received for all children listed in your household. Do not include foster care/adoption payments or any amount that was court ordered but not actually paid.
\$	Housing, food, and other living allowances paid to members of the clergy, military, and others (including cash payments and/or cash value of benefits received). Do not include the value of on-base military housing or the value of a basic military allowance for housing.
\$	Veterans' non-education benefits , such as Disability, Death Pension, Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study Allowances. Do not include Post-9/11, GI Bill, Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits.
\$	Any other untaxed income or benefits not reported elsewhere on this form, such as workers' compensation, disability benefits, untaxed portions of health savings accounts from IRS Form 1040 Line 25, etc. Don't include extended foster care benefits, student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Innovation and Opportunity Act (WIOA) educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.
\$	Cash or any other money paid on your behalf , not reported elsewhere on this form. (Student only). Include any payments from a parent or other person NOT reported on the 2019-20 FAFSA for things such as rent, utility bills, etc. Amounts paid on the student's behalf from a 529 plan owned by someone other than the student or the student's parents (such as grandparents or aunts/uncles) must also be included.
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Don't enter untaxed combat pay reported on the W-2 (Box 23, Code Q)
\$	Taxable earnings from need-based employment programs , such as Federal Work Study and need-based employment portions of Fellowships and assistantships.

Section 4: FAMILY INFORMATION

List below the people in your household. Include: 1) **yourself**; 2) **your spouse**, if you are married; 3) **your children and your spouse's children** if you or your spouse will provide more than half of the children's support from July 1, 2019 through June 30, 2020, even if the children do not live with you or your spouse; 4) **other people** if they now live with the you and you or your spouse provides more than half of their support and will continue to provide more than half of their support through June 30, 2020.

Number in College: For any household member who will be enrolled **at least half-time** in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2019 and June 30, 2020 include the name of the college.

Full Name	Age	Relationship to you	College Attending (if at least half-time 2019-20)	Will be Enrolled at Least Half Time (yes or no)
<i>Missy Jones (example)</i>	22	<i>Spouse</i>	<i>Central University</i>	<i>yes</i>
		<i>Self</i>	<i>SUM</i>	

