



## 2019-2020 Independent Student Income Worksheet

Your 2019-2020 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. Your awards are an estimate until the verification process is complete and awards finalized. Send all required documents to Student Financial Services (by mail or in person) within 14 days of initial notification or awards may be cancelled. Student Financial Services reserves the right to request additional documentation necessary to resolve conflicting information.

### A. Independent Student's Information

Student's Last Name

Student's First Name

Student's M.I.

Grizzly ID (G#)

### B. Student and Spouse (if married) Income Information: Please check the box(es) next to your 2017 Income Status

The instructions below apply to the student and spouse (if married) included in the household (as listed on FAFSA). If attachment is required, please submit all documents together. Additional instructions for obtaining required income documentation are below.

- I (we) used the IRS Data Retrieval Tool on the FAFSA to transfer 2017 Federal Tax Return Information into the FAFSA and made no changes to the information before submitting.
- I (we) filed a 2017 Federal Tax Return and did not or could not use the IRS Data Retrieval Tool on the FAFSA. I am attaching the following:
  - **ATTACH** an official 2017 IRS TAX RETURN TRANSCRIPT (this is not a 1040).
- I (we) **did not** earn income from work in 2017 and will not file a 2017 Federal Tax Return and not required to file 2017 Federal Tax Return. I am attaching the following:
  - **ATTACH** a copy of your and your spouses' 2017 IRS Verification of Non-filing Letter dated 10/01/18 or later.
- I (we) earned income from work in 2017 but **did not** file a 2017 Federal Tax Return and not required to file 2017 taxes. I am attaching and completing the following:
  - **ATTACH** copies of all of your and your spouses' (if married) 2017 W-2 form(s) and Schedule C (if applicable) **and**
  - **ATTACH** a copy of your and your spouses' 2017 IRS Verification of Non-filing Letter dated 10/01/18 or later **and**
  - **LIST BELOW** every employer you and your spouse (if married) earned income from work in 2017.

Name of Student or Spouse (as listed on the FAFSA)	Employer's Name (example: Grizzly's Lawn Care)	IRS W2 Provided? (Yes or No)	Amount Earned in 2017
			\$
			\$
			\$

#### Instructions to Obtain Income information

##### Using the IRS Data Retrieval Tool:

1. Login at [fafsa.ed.gov](http://fafsa.ed.gov) to "Make FAFSA Corrections"
2. On the FAFSA, in the Financial Information section, click "Link to IRS"
3. On the IRS website, complete form and click on "Transfer my tax information into the FAFSA" (submit your updated FAFSA)

##### Requesting an IRS Tax Return Transcript: You can request a 2017 IRS Tax Return Transcript one of the following ways:

1. Online Request: Go to <http://www.irs.gov/>. Click "Get Tax Transcript." CAUTION: Request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
2. Phone Request: 1-800-908-9946,
3. Paper Request Form -- IRS Form 4506T-EZ or IRS Form 4506-T, submit this form to the IRS

##### Requesting an IRS Verification of Non-filing Letter (must be dated after October 1, 2018): You can request an IRS letter of Non-Filing one of the following ways:

1. Online Request - Go to [www.IRS.gov](http://www.IRS.gov). Click "Get Tax Transcript."
2. Paper Request Form - - IRS Form 4506T-EZ or IRS Form 4506-T, submit this form to the IRS



**2019-2020 Student Income Worksheet** continued

Student's Last Name

Student's First Name

Student's M.I.

Grizzly ID (G#)

**C. Student Expense Form**

Is your and your spouses' (if married) 2017 income less than the amount listed below for the number of people in your household?

- If yes, complete the Student Expense Form below and then complete Section D
- If no, do not complete this section, skip to Section D

Household Size	1	2	3	4	5	6	7	8
<b>2017 Income</b>	\$12,060	\$16,240	\$20,420	\$24,600	\$28,780	\$32,960	\$37,140	\$41,320

Note: For each additional family member, add \$4,180

The income reported on your 2019-2020 FAFSA is blank, zero or appears unusually low to support the number of people in your household. Please list monthly expenses from January 1, 2017 – December 31, 2017 (Even if paid by someone else on your behalf)

Student Expense Form	Total Monthly Amount DO NOT LEAVE ANY QUESTION BLANK
Mortgage or Rent	\$ _____ per month
Groceries (meals/food)	\$ _____ per month
Utilities	\$ _____ per month
Transportation (car payment, gas, transit)	\$ _____ per month
Insurance (medical, automotive)	\$ _____ per month
Medical/dental (not covered by insurance)	\$ _____ per month
Clothing/personal expenses (entertainment, gifts, etc.)	\$ _____ per month
<b>TOTAL (monthly expenses)</b>	\$ _____

**Explanation**

If 'Mortgage or Rent' above is reported as \$0 and/or if the total expenses listed above exceed your income, use the space below to explain how the expense is covered. If covered by a federal/state benefit (i.e. social security, TANF, etc.) not listed on the FAFSA or other documents submitted, please provide supporting documentation from the awarding agency.

**D. Certification and Signatures**

- **SIGNATURES REQUIRED:** I certify that the information provided on this form is true and complete to the best of my knowledge. I understand that based on the information provided changes in my student's FAFSA financial information may occur and may result in a change in financial aid eligibility.

Student Signature

Date

Spouses' Signature

Date