

Federal Student Aid Programs

#### What you should do

- Go to www.fafsa.gov and utilize the IRS data retrieval tool if 1. eligible. If not eligible, collect your (and your spouse's) financial documents (tax return transcripts, W-2, etc.)
  - 2. Complete and sign this worksheet.
  - Submit the completed worksheet and any other documents 3. requested to your financial aid counselor - (refer to the enclosed letter).
  - Warner Pacific College will compare information on this 4. worksheet and any supporting documents with the information you submitted on your FAFSA. Corrections may be made by the College.
  - Warner Pacific College may require additional documentation 5. if we have reason to believe that the information provided is inaccurate.

### A. Student Information

electronically by the college.

Last Name	First Name	M.I.	Social Security Number	
Address (include Apt. no.)			Date of birth	
City	State	Zip Code	Phone number (include area code)	
	<b>6</b>		- Email address	

## **B.** Family Information

List the people in your household including:

yourself, and your spouse if applicable, and

Your application was selected for review in a process called

Federal aid. If there are differences between your application

require assistance, please contact your financial aid counselor.

"Verification." In this process, Warner Pacific College will be comparing

information from your application with signed copies of your (and your

spouse's, if you are married) 2013 Federal tax return transcripts, W-2

information and your financial documents, corrections may be made

Complete this verification form and submit it to Warner Pacific College

as soon as possible, so that your financial aid will not be delayed. If you

forms (if not filing a tax return), or other financial documents. The law

states we have the right to ask you for this information before awarding

- your children, if you will provide more than half of their support from July 1, 2014 through June 30, 2015, 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 from July 1, 2014 through June 30, 2015.

Write the names of all household members in the space(s) below. Also write the name of the college for any household member who will be attending college at least half time between July 1, 2014 and June 30, 2015, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)	
Missy Jones (example)	18	Sister	Central College	Yes	
		Self	Warner Pacific College		

## About the IRS Data Retrieval Tool:

The Department of Education is encouraging all FAFSA filers to use the IRS Data Retrieval Tool to complete the tax return information on the FAFSA in 2014-2015. The IRS Data Retrieval Tool is available for those who qualify at <u>www.fafsa.gov</u> about 2 weeks after electronically filing your 2013 tax return or 8 weeks if filing by paper.

# You cannot use the IRS Data Retrieval Tool if any of the following apply. You must submit an IRS Tax Return Transcript to our office instead:

- 1. Individual filed a joint tax return but now is separated, divorced, widowed or married to another individual.
- 2. Individual is married but filed a separate tax return from their spouse.
- 3. Individual used the IRS Data Retrieval Tool, but needed to change the information.
- 4. Individual filed a Non-IRS Tax Return (Foreign or Territory). Submit a copy of that tax form signed by the tax payer.
- 5. Individual was granted a filing extension from the IRS. Submit a copy of your IRS Form 4868 and all W2s received and/or a profit and loss statement (if self-employed).

If you utilize the IRS Data Retrieval Tool, and do not make any changes to the information, tax return transcripts are not required. **If you cannot use the IRS Data Retrieval tool and filed a tax return, you must submit a Tax Return Transcript.** Tax return transcripts can be requested from the IRS online at <u>www.irs.gov</u> or by calling (800)908-9946.

## C. Student's Tax and Income Information (all applicants)

- 1. Check only one box below.
  - Check here if you will use/used the IRS Data retrieval tool at <u>www.fafsa.gov</u> and will not/did not make any changes to the information.
  - Check here if you are attaching a signed copy of your tax return transcript.
  - □ Check here if a signed tax return transcript will be submitted to the school by \_\_\_\_\_\_ (date).
  - Check here if you were not employed and had no income earned from work in 2013.
  - Check here if you were employed in 2013, but will not file and are not required to file a 2013 U.S. Income Tax Return. Complete the box below and submit copies of all W2's to the financial aid office.

Sources of Income from Work	2013 Income
	\$
	\$
	\$

### D. Spouse's Tax and Income Information (if student is married)

- 1. Check only one box below.
  - Check here if you & your spouse filed jointly and will use/used the IRS Data retrieval tool at <u>www.fafsa.gov</u> and will not/did not make any changes to the information.
  - Check here if you are attaching a signed copy of your spouse's tax return transcript.
  - □ Check here if a signed tax return transcript will be submitted to the school by \_\_\_\_\_ (date).
  - Check here if your spouse was not employed and had no income earned from work in 2013.
  - Check here if your spouse was employed in 2013, but will not file and is not required to file a 2013 U.S. Income Tax Return. Complete the box below and submit copies of all W2's to the financial aid office.

Sources of Income from Work	2013 Income
	\$
	\$
	\$

### E. Sign this Worksheet

Each person signing this form certifies that all of the information reported on it is complete and correct. The student must sign and date. If married, spouse's signature is optional.

Student

Date

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