



WESTMONT

2023-2024 Independent Student Verification Worksheet

Students who are selected for Verification must submit *either* a **signed copy** of their **2021 Federal Income Tax Return** or an **IRS Tax Return Transcript**. Students who did not file a tax return for 2021 must submit a **Verification of Non-Filing Letter**. The Verification of Non-Filing Letter can be ordered on-line at www.irs.gov/Individuals/Get-Transcript.

STUDENT INFORMATION

| | | | |
|----------------|------------|----------|---|
| Last Name | First Name | M.I. | Westmont ID Number or Last 4 digits of Social Security Number |
| Address | | | Birthdate |
| City | State | Zip Code | Student's Permanent Telephone |
| E-mail Address | | | Student's Cell Phone |

FAMILY INFORMATION

List everyone in your household, including:

- **yourself** and
- **your spouse if you have one**, and
- **your children**, if you will provide more than half of their support from July 1, 2023 through June 30, 2024, even if they don't live with you, and
- **other people only** 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, 2023 through June 30, 2024.

| Full Name | Age As of Dec. 31, 2023 | Relationship to this student | For each family member who will be enrolled in a college or university degree program <u>during the 23-24 academic year</u> , write the name of the college he/she will be attending |
|-----------|-------------------------|------------------------------|--|
| 1. | | <i>Self</i> | <i>Westmont College</i> |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |
| 6. | | | |
| 7. | | | |

STUDENT TAX INFORMATION

Check here if you are providing or will provide the required **Verification of Non-filing Letter** because you did not file and were not required to file a 2021 Federal Income Tax Return.

A **Verification of Non-filing Letter** is required to show that an individual did not file taxes in 2021. The letter can be printed or saved to your computer directly from the IRS website. Go to <http://www.irs.gov/Individuals/Get-Transcript> to set up an account and obtain your Non-filing Letter. If you are unable to set up an account online, you may print out, complete and fax or mail the IRS **Form 4506-T Request for Transcript of Tax Return**, found at <https://www.irs.gov/pub/irs-pdf/f4506f.pdf>, to receive it by mail (check box 7 to request Verification of Non-filing).

If you did not file, please list the sources and amounts for any income you received in 2021.

| EMPLOYERS/SOURCES OF INCOME FOR 2021 | TOTAL AMOUNT OF INCOME RECEIVED IN 2021 |
|--------------------------------------|---|
| | |
| | |

Check here if you are providing or will provide *either* a signed copy of your Federal Income Tax Return for 2021 *or* an IRS Tax Return Transcript.

Check here if you used the IRS Data Retrieval Tool in the FAFSA on the Web to transfer your 2021 IRS Income Tax Return information into your FAFSA.

STUDENT MARITAL STATUS

As of the day that I first completed the 2023-2024 FAFSA, I was

- Single (continue to next page)
- Separated/Divorced (continue to next page)
- Married/remarried

SPOUSE'S TAX INFORMATION (IF STUDENT IS MARRIED)

Check here if you are providing or will provide the required **Verification of Non-filing Letter** because your spouse did not file and was not required to file a 2021 Federal Income Tax Return.

A **Verification of Non-filing Letter** is required to show that an individual did not file taxes in 2021. The letter can be printed or saved to your computer directly from the IRS website. Go to <http://www.irs.gov/Individuals/Get-Transcript> to set up an account and obtain your Non-filing Letter. If you are unable to set up an account online, you may print out, complete and fax or mail the IRS **Form 4506-T Request for Transcript of Tax Return**, found at <https://www.irs.gov/pub/irs-pdf/f4506f.pdf>, to receive it by mail (check box 7 to request Verification of Non-filing).

If your spouse did not file a tax return but had income from any source in 2021, please list the sources and amounts below. Please also include a copy of their employer-generated W-2(s) for 2021.

| EMPLOYERS/SOURCES OF INCOME FOR 2021 | TOTAL AMOUNT OF INCOME RECEIVED IN 2021 |
|--------------------------------------|---|
| | |
| | |

Check here if you are providing or will provide *either* a signed copy of your spouse's Federal Income Tax Return for 2021 *or* an IRS Tax Return Transcript.

Check here if you have used the IRS Data Retrieval Tool in the FAFSA on the Web to transfer the 2021 IRS Income Tax Return information into the student's FAFSA.

**Please be sure to provide an amount for each item on this page, entering \$0 where appropriate.
Incomplete forms will be returned to you.**

ASSET INFORMATION

| Report the value of the items below as of the date you filed the FAFSA | Student | Spouse |
|---|---------|--------|
| Cash, savings and checking accounts (as of the date you filed the FAFSA). Provide exact figures only; do not round. | \$ | \$ |
| Net worth of your investments, including real estate (as of the date you filed the FAFSA). Do not include your primary residence or the value of bona fide retirement accounts. Provide exact figures only; do not round. | \$ | \$ |
| Net worth of your current business and/or investment farms (as of the date you filed the FAFSA). Do not include a farm that you live on and operate. Do not include a business that you own and control (more than 50% ownership) and has fewer than 100 employees. | \$ | \$ |

ADDITIONAL FINANCIAL INFORMATION

| Report annual amounts from 2021 | Student | Spouse |
|---|---------|--------|
| Taxable financial aid, including earnings from need-based employment programs, such as Federal Work-Study, as well as any taxable grants and scholarships included in your adjusted gross income. | \$ | \$ |
| Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay. | \$ | \$ |

UNTAXED INCOME

| Report annual amounts from 2021 | Student | Spouse |
|--|---------|--------|
| Payments to tax-deferred pension and savings plans | \$ | \$ |
| Child support <u>received</u> (Do not include foster care or adoption payments) | \$ | \$ |
| Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value benefits) Do not include the value of on-base military housing or the value of basic military allowance for housing. | \$ | \$ |
| Worker's Compensation and/or Disability | \$ | \$ |
| Veterans Noneducation Benefits | \$ | \$ |
| Money received (including from your parent(s)) or expenses paid on your behalf | \$ | \$ |
| Other untaxed income | \$ | \$ |

SIGNATURE

By signing this worksheet, I/we certify that all the information is complete and correct:

Student's signature

Date

Spouse's signature

Date

Submit this completed form to:
Westmont College
Student Financial Services
955 La Paz Road
Santa Barbara, CA 93108
Email: sfs@westmont.edu

Questions? Call our Student Financial Services Help Line at (888) 963-4624.