



WESTMONT

2017-2018 Independent Student Verification Worksheet



All students who complete the FAFSA for Westmont financial aid and who filed a tax return for 2015 must also submit a copy of the 2015 IRS **Tax Return Transcript**. Students who did not file a tax return for 2015 must submit a **Verification of Non-filing Letter**.

STUDENT INFORMATION

| | | | |
|----------------|------------|----------|---|
| Last Name | First Name | M.I. | Westmont ID Number or Last 4 digits of Social Security Number |
| Address | | | Birth Date |
| 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, 2017 through June 30, 2018, 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, 2017 through June 30, 2018.

| Full Name | Age As of Dec. 31, 2017 | Relationship to this student | For each family member who will be enrolled in a college or university degree program during the 17-18 academic year, 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 MARITAL STATUS

As of the day that I first completed the 2017-2018 FAFSA, I was:

- Single
- Married/remarried
- Separated

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 2015 federal income tax return.

If you did not file, please list the sources and amounts for any income you received in 2015.

| EMPLOYERS/SOURCES OF INCOME FOR 2015 | TOTAL AMOUNT OF INCOME RECEIVED IN 2015 |
|--------------------------------------|---|
| | |
| | |

- Check here if you are providing or will provide a copy of your **Tax Return Transcript** for 2015.
- Check here if you have already provided a copy of your **Tax Return Transcript** for 2015.

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 2015 federal income tax return.

If your spouse did not file a tax return but had income from any source in 2015, please list the sources and amounts below. Please also include a copy of their W-2(s) for 2015.

| EMPLOYERS/SOURCES OF INCOME FOR 2015 | TOTAL AMOUNT OF INCOME RECEIVED IN 2015 |
|--------------------------------------|---|
| | |
| | |

- Check here if you are providing or will provide a copy of your spouse's **Tax Return Transcript** for 2015.
- Check here if you have already provided your spouse's **Tax Return Transcript** for 2015

REQUIRED TAX DOCUMENTS INFORMATION

A **Tax Return Transcript** is not a photocopy of your return. A transcript 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 access your transcript. If you are unable to set up an account online, you may print out, complete, and fax or mail to the IRS **Form 4506-T Request for Transcript of Tax Return** found at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>, to receive it by mail (check box 6a to request a Return Transcript).

A **Verification of Non-filing Letter** is required to show that a student or spouse was not required to file taxes in 2015. 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 access your transcript. If you are unable to set up an account online, you may print out, complete, and fax or mail to the IRS **Form 4506-T Request for Transcript of Tax Return** found at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>, to receive the letter by mail (check box 7 to request Verification of Nonfiling), or use the forms found online at http://www.westmont.edu/_offices/financial_aid/documents/ParentTaxNon-FilingSelf-Cert.pdf for parents, and http://www.westmont.edu/_offices/financial_aid/documents/StudentTaxNon-FilingSelf-Cert.pdf for students

ASSET INFORMATION

| Report the value of the items below as of the date you filed the FAFSA (indicate -0- (zero) where appropriate; do not leave any item blank) | 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. Provide exact figures only; do not round. | \$ | \$ |

ADDITIONAL FINANCIAL INFORMATION

Read each line and provide annual amounts from 2015. Enter \$0 for each line that does not apply to you (or your spouse).

| Report annual amounts from 2015. Enter \$0 if not applicable. | Student | Spouse |
|---|---------|--------|
| Taxable financial aid, including earnings from need-based employment programs, such as Federal Work-Study. | \$ | \$ |
| 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 *untaxed* income received by you (and your spouse) in the boxes below. Read each line and provide annual amounts from 2015. Enter \$0 for each box that does not apply to you (or your spouse). This worksheet will be returned to you if items are left blank.

| Report annual amounts from 2015. Enter \$0 if not applicable. | 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 or paid on your behalf | \$ | \$ |
| Other untaxed income | \$ | \$ |

SIGNATURE

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

Student

Date

Spouse

Date

Submit this completed form to:

Westmont College
Office of Financial Aid
955 La Paz Road
Santa Barbara, CA 93108
Fax: 805-565-7157
Email: finaid@westmont.edu