



# WESTMONT

## 2019-2020 Dependent Student Verification Worksheet



All students and parents who complete the FAFSA and who filed a tax return for 2017 must also submit a copy of the 2017 IRS **Tax Return Transcript**. Parents who did not file a tax return for 2017 must submit a **Verification of Non-filing Letter**. These can be ordered on line at [www.irs.gov/Individuals/Get-Transcript](http://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 *parent(s)' household*, including:

- **yourself** and
- **your custodial parent(s)** (including stepparent), and
- **other children in your parent's household** if:
  - your parent(s) will provide more than half of their support from July 1, 2019 through June 30, 2020, **or**
  - the children would be required to provide parental information when applying for federal student aid, and
- **other people only** if they now live with your parents **and** your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2019 through June 30, 2020.

Full Name	Age As of Dec. 31, 2019	Relationship to this student	For each family member who will be enrolled in a degree program <u>during the 2019-2020 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 EARNINGS FOR 2017

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Did you work during 2017?

- No – Continue to Student Tax Information section
- Yes – List all sources of income amounts received in 2017. Please also include a copy of all W-2 forms for 2017.

EMPLOYERS/SOURCES OF INCOME FOR 2017	TOTAL AMOUNT OF INCOME RECEIVED IN 2017

## STUDENT TAX INFORMATION

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- Check here if you did not file and were not required to file a 2017 federal income tax return.
- Check here if you are providing or will provide a copy of your Tax Return Transcript for 2017.
- Check here if you have already provided a copy of your Tax Return Transcript for 2017.

## PARENT TAX INFORMATION

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- Check here if you are providing or will provide a copy of your parents' **IRS Tax Return Transcript** for 2017.
- Check here if you are providing or will provide the required **Verification of Non-filing Letter** because your parent(s) did not file and were not required to file a 2017 federal income tax return.

**If your parent(s) do not file a tax return but had income from any source in 2017, please list the sources and amounts below. Please also include a copy of their employer-generated W-2(s) for 2017.**

EMPLOYERS/SOURCES OF INCOME FOR 2017	TOTAL AMOUNT OF INCOME RECEIVED IN 2017

- Check here if you have already provided a copy of your parents' **Tax Return Transcript** for 2017.

## REQUIRED TAX DOCUMENTS INFORMATION

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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 obtain 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/f4506f.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 parent did not file taxes in 2017. 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).

**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	Parent(s)
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 <u>from 2017</u>	Student	Parent(s)
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 annual amounts <u>from 2017</u>	Student	Parent(s)
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 <b>not</b> 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 the student's behalf (not including support from custodial parents)	\$	\$
Other untaxed income	\$	\$

**SIGNATURE**

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

\_\_\_\_\_  
Student

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent

\_\_\_\_\_  
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](mailto:finaid@westmont.edu)**

**Questions? Call our Financial Aid Help Line at (888) 963-4624.**