



WESTMONT

2019-2020 Independent Student Verification Worksheet



All students who complete the FAFSA and who filed a tax return for 2017 must also submit a copy of the 2017 IRS **Tax Return Transcript**. Students 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.

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, 2019 through June 30, 2020, 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, 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 college or university degree program <u>during the 19-20 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 MARITAL STATUS

As of the day that I first completed the 2019-2020 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 2017 federal income tax return.

If you do not file, please list the sources and amounts for any income you received in 2017.

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

- 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.

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 were not required to file a 2017 federal income tax return.

If your spouse did 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 are providing or will provide a copy of your spouse's **Tax Return Transcript** for 2017.
 Check here if you have already provided your spouse's **Tax Return Transcript** for 2017.

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 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 student or spouse was not required to 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	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 2017	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 annual amounts from 2017	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, I/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

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