

DEPENDENT STUDENT VERIFICATION STATEMENT

**Allegheny College
2023-2024**

Student Name _____ Allegheny Student I.D. Number _____
 Home Address _____
 Street / P.O. Box _____ City _____ State _____ Zip Code _____
 Cell Phone Number (_____) _____ Home Phone Number (_____) _____
 Email Address _____

- 1) FAMILY INFORMATION** – List the people in your household. Please include:
- yourself, your sibling(s), and your parent(s) (including stepparent)
 - your parents’ other children, even if they don’t live with your parent(s), but your parents will provide more than half their financial support between July 1, 2023 through June 30, 2024
 - other people 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, 2023 through June 30, 2024

Write the names of all HOUSEHOLD members in the space(s) below. Also, write in the name of the college for any family member (excluding parents) who will be attending college at least half-time between July 1, 2023 and June 30, 2024 and will be enrolled in a degree, diploma or certificate program. If you need more space, please attach a separate page.

List EVERYONE Who Lives in Your Home	Age	Relationship To Student	If They Attend College, List Name of College	Will be Enrolled at least Half-Time (Circle Yes or No)	
_____	_____	Self	Allegheny College	Y	N
_____	_____	Parent 1	N/A		
_____	_____	Parent 2	N/A		
_____	_____	Sibling	_____	Y	N
_____	_____	Sibling	_____	Y	N
_____	_____	_____	_____	Y	N

- 2) 2021 UNTAXED INCOME** – Enter amounts received in 2021 for parents and all dependent children (including student) in spaces provided below.

Do Not Leave Blank Spaces Below - Enter ‘n/a’ or ‘zero’ if below items are not applicable.

- a) Payment(s) to Tax Deferred Retirement/Pension Plans \$ _____
(Yearly amount shown on 2021 W-2s in boxes 12a-12d using codes **D, E, F, G, H, S**)
- b) Housing, food, or living allowances (clergy/military) \$ _____
(Do not include the value of on-base military housing or the value of a basic military allowance for housing)
- c) Child support received \$ _____
- d) Veterans non-education benefits \$ _____
- e) Untaxed Health Savings Account (line 13 on IRS Form 1040-Schedule 1) \$ _____
- f) Money received or paid on behalf of the student \$ _____
(Excluding money from custodial parent(s) – e.g.: cash, 529 plans, gift cards, etc.)
- g) **Other un-taxed income that is not listed above:** _____ \$ _____
(Examples: Untaxed Workman’s Compensation, Disability, Unemployment, etc.)

DO NOT include as Untaxed Income: Extended Foster Care Benefits, Student Aid, Earned Income Credit, Additional Child Tax Credit, Untaxed Social Security Benefits, SSI, Combat Pay, Veterans’ Education Benefits, Rent Subsidies for Low-income Housing, Heating/Fuel Assistance, Welfare Benefits, Payments Received From State for Foster Care, Foreign Income Exclusion, Credit for Federal Tax on Special Fuels, Per Capita Payments to Native Americans, Employee Flexible Spending Arrangements, and In-Kind Support.

- 3) 2021 PARENT(S) W-2 WAGE STATEMENTS** – Please submit copies of all parent(s) 2021 W-2 wage statements with this worksheet. If parent(s) is self-employed owns a farm, or is in a partnership, please include a copy of their Schedule C, Schedule F, Schedule E, and/or Schedule K-1 from their 2021 Tax Return.

Parent #1: W-2s/Schedule(s) provided

Parent #2: W-2s /Schedule(s) provided

4) **2021 PARENT INCOME VERIFICATION (Must Check One)**

- Check here if you, the parent(s), have used the IRS DRT in FAFSA on the Web to transfer 2021 income tax return information into the student's FAFSA.
 - Check here if you, the parent(s), have not yet used the IRS DRT in FAFSA on the Web, but will use the tool to transfer 2021 income tax return information into the student's FAFSA.
 - IRS Data Retrieval Tool instructions can be found at <https://sites.allegheny.edu/finaid/fafsa/>
 - Check here if you, the parent(s), are unable to use the IRS DRT in FAFSA on the Web and instead will provide Allegheny College with a 2021 IRS Tax Return Transcript **OR** a copy of a signed 2021 Tax Return with all Schedules.
 - Tax Return Transcripts will take 2 weeks longer than using the IRS Data Retrieval Tool. To request a tax transcript, please visit the website www.irs.gov. Instructions available at <https://sites.allegheny.edu/finaid/fafsa/>
 - Check here if you, the parent(s), are not required to file a 2021 U.S. Federal Tax Return.
 - Please complete and return a 'Parent Statement of Non-Filing' form, *4506-T IRS non-filing verification form,* and copies of all 2021 W-2s with this Verification Statement (available at <https://sites.allegheny.edu/finaid/fafsa/>).
- ❖ **If parent(s) filed an AMENDED 2021 Tax return, please submit a signed copy of parent's 2021 Amended Return (1040X) AND a signed copy of parent's original 2021 Tax Return (1040). Include schedules from both returns (if applicable).**

5) **2021 STUDENT INCOME INFORMATION (Must Check One)**

- Check here if you, the student, have used the IRS DRT in FAFSA on the Web to transfer 2021 income tax return information into your FAFSA.
 - Check here if you, the student, have not yet used the IRS DRT in FAFSA on the Web, but will use the tool to transfer 2021 income tax return information into your FAFSA
 - IRS Data Retrieval Tool instructions can be found at <https://sites.allegheny.edu/finaid/fafsa/>.
 - Check here if you, the student, are unable to use the IRS DRT in FAFSA on the Web and instead will provide Allegheny College with a 2021 IRS Tax Return Transcript **OR** a copy of a signed 2021 Tax Return with all Schedules.
 - Tax Return Transcripts will take 1-2 weeks longer than using the IRS Data Retrieval Tool. To request a tax transcript, please visit the website www.irs.gov. Instructions available at <https://sites.allegheny.edu/finaid/fafsa/>
 - Check here if you (the student) will not and are not required to file a 2021 U.S. Federal Tax Return.
 - If not filing a tax return, student must list their total income earned as shown on 2021 W-2s
\$ _____ **(Do Not Leave a Blank Space - Enter 'n/a' or 'zero' if not applicable)**
 - If not filing a tax return but earned money in 2021 without receiving a W-2 (i.e. babysitting), student must list their income.*
\$ _____ **(Do Not Leave a Blank Space - Enter 'n/a' or 'zero' if not applicable)**
- *Please note: If you, the student, earned more than \$400 from self-employment earnings, please contact a tax professional to see if you must file a 2021 tax return.
- ❖ **If you, the student, filed an AMENDED 2021 Tax return, please submit a signed copy of your 2021 Amended Return (1040X) AND a signed copy of your original 2021 Tax Return (1040). Include schedules from both returns (if applicable).**

6) **2021 IRA or PENSION ROLLOVER VERIFICATION (Must Check One)**

- Check here if parent(s) and/or student DID NOT have a Rollover Contribution in 2021.
- Check here if parent(s) and/or student DID have a Rollover Contribution in 2021.
 - \$ _____ Enter the amount of household Rollover Contributions.

7) **Sign this Worksheet**

By signing this worksheet, we certify that all the information reported on it is complete and correct. At least one parent must sign.

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

Student Signature Required (Parent/stepparent may not sign for student)

Date

Parent Signature Required (Student may not sign for Parent/stepparent)

Date