

This form, along with supporting documents, must be returned within 30 days of receipt

Independent 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. YOUR HOUSEHOLD SIZE AND NUMBER IN COLLEGE

List the name, age, and relationship of each person who is a member of your household. Include yourself, your spouse (if married) and your dependent children (if applicable) if you will provide at least half of their support during the 2023-2024 academic year (July 1, 2023 through June 30, 2024). For any household members who will be attending college during 2023-2024, please indicate where they will enroll.

Name	Age	Relationship	If Attending College, List Name of College	Will be Enrolled at least Half Time (Circle Yes or No)
_____	_____	Self	Allegheny College	Y N
_____	_____	_____	_____	Y N
_____	_____	_____	_____	Y N
_____	_____	_____	_____	Y N
_____	_____	_____	_____	Y N
_____	_____	_____	_____	Y N

2. 2021 UNTAXED INCOME – Enter amounts received in 2021 for you, your spouse (if married), and all dependent children in spaces provided below.

Do Not Leave Blank Spaces - Enter 'n/a' or 'zero' if any items below 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 Student and Spouse (if married) W-2 wage statements – Please submit copies of all student and spouse (if married) 2021 W-2 wage statements with this worksheet. If student and spouse (if married) are self-employed, own a farm, or are in a partnership, please send a copy of your Schedule C, Schedule F, Schedule E, and/or Schedule K-1 from your 2021 Tax Return.

Student: W-2s/Schedule(s) provided

Spouse (if married): W-2s/Schedule(s) provided

4. **2021 Student and Spouse (if married) Income Verification** **(Must Check One)**

- Check here if you and your spouse (if married), 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 and your spouse (if married), 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 and your spouse (if married) 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 are also available at <https://sites.allegheny.edu/finaid/fafsa/>.
 - Check here if you or your spouse (if married), are not required to file a 2021 U.S. Federal Tax Return.
 - Please complete and return an 'Independent Student Statement of Non-Filing' form, 4506-T IRS non-filing verification form, (available at <https://sites.allegheny.edu/finaid/fafsa/>) and copies of all 2021 W-2s with this Verification Statement.
**Please note: If you or your spouse (if married) 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 and your spouse (if married) filed an AMENDED 2021 Tax return, please submit a signed copy of your 2021 Amended Return (1040X) AND a signed copy of your and your spouse's (if married) original 2021 Tax Return (1040). Include schedules from both returns (if applicable).**

5. **2021 IRA or Pension Rollover Verification** **(Must Check One)**

- Check here if you or your spouse (if married) DID NOT have a Rollover Contribution in 2021.
- Check here if you and your spouse (if married) DID have a Rollover Contribution in 2021.
 - \$ _____ Enter the amount of household Rollover Contributions

6. **Sign this Worksheet**

By signing this worksheet, we certify that all the information reported on it is complete and correct.

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

Date

Spouse Signature Required (if married)

Date

Allegheny College
Financial Aid Office
520 North Main St.
Meadville, PA 16335

Fax: (814) 332-2349
Email: FAO@allegheny.edu