Financial Aid

Verification Statement – Dependent

SAINT MARY'S COLLEGE
NOTRE DAME, IN

__DO NOT LEAVE ANY ITEMS BLANK__ **Incomplete forms will be returned to you**. The priority **deadline** for all requested verification documents is **__May 15__**. **If your completed documents are not received by May 15, your financial aid package will not be sent before tuition bills are emailed to students in July**. NOTE: If there are differences between the data reported on your applications and the verification documents, we will electronically correct your aid applications.

A. STUDENT INFORMATION

Student Name: _____ Saint Mary's Student ID #: _____

SMC Graduation Year: _____

Student Status (circle one):   New Student   Returning Student   Transfer Student

Intended Housing (circle one):   On-Campus   Study abroad   Off-Campus/Renting   With Parents/Other Relatives

B. FAMILY INFORMATION

MAKE SURE YOU INCLUDE THE FOLLOWING IN THE GRID BELOW:

► Yourself and your custodial parent(s), including step-parent if applicable, *even if you do not live with your parent(s)*, and

► Your parent(s)' other children, *even if they do not live with your parent(s),* if:

   a) your parent(s) will provide more than half of their support from July 1, 2014 through June 30, 2015, **OR**
   b) the children would be required to provide parental information when applying for Federal Student Aid

► Other people if they now live with your parent(s) **AND** your parent(s) provide more than half of their support **AND** will continue to provide more than half of their support from July 1, 2014 through June 30, 2015.

► If anyone in the household will be attending college at least half-time between July 1, 2014 and June 30, 2015, and will be enrolled in a degree, diploma or certificate program, please list the name of the college attending, the year in college and what degree they are seeking.

If you need additional space, please attach a separate page.

FULL NAME	AGE	RELATIONSHIP TO STUDENT	ATTENDING COLLEGE? Y/N	NAME OF COLLEGE ATTENDING IN 2014-15 AND YEAR IN COLLEGE (freshman, sophomore, junior, senior, grad student, etc.)	DEGREE SEEKING (BA, BS, etc.)
		SELF			

C. PARENT FEDERAL TAX RETURN STATUS
(Check one of the boxes below)

☐ I/we **HAVE FILED** a 2013 Federal tax return
Complete the IRS data retrieval tool or order a copy of the tax RETURN transcript and submit to the Financial Aid Office <u>along with copies of ALL W-2 wage statements, and/or Schedule K-1 (form 1065, if applicable), and Schedule C from the federal tax return.</u>

___ Please check here if you have completed or plan to complete the IRS Data Retrieval Tool once the parent(s) IRS tax return has been filed
- To complete the IRS data retrieval tool, go to www.FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section at the top of the page. From there, follow the instructions to determine if the parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2013 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS data retrieval tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. Please view the instructional tutorial at www.saintmarys.edu/verification-changes for further details regarding the IRS data retrieval process.

___ Please check here if the parent(s) is unable or chooses not to complete the IRS Data Retrieval Tool, and the parent(s) will instead submit to the student's school a copy of their 2013 IRS tax RETURN transcript (<u>not</u> the actual federal tax return) of the income tax return to the school
- To obtain an IRS tax **RETURN** transcript, go to www.irs.gov and click on the "Get transcript for my tax records" link, or call the IRS at 1-800-908-9946. Make sure you order the "IRS tax **RETURN** transcript" and **<u>not</u>** the "IRS tax ACCOUNT transcript." The parent will need his/her Social Security number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2013 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers. If the parents are married, and separate 2013 tax returns were filed, 2013 IRS tax **RETURN** transcripts must be submitted for **<u>each</u>** parent.

☐ I/we have an **EXTENSION** to file a 2013 Federal tax return. The extension expires: _____.
Submit a copy of tax extension Form 4868 along with a written and signed statement of estimated AGI (adjusted gross income), a copy of Schedule K-1 (form 1065, if applicable), Schedule C from the federal tax return, and <u>copies of all W-2 wage statements</u> to the Financial Aid Office.

* **Note the financial aid file will remain *incomplete* until the IRS Data Retrieval Tool is completed or a copy of the tax <u>return</u> transcript, a copy of Schedule K-1 (form 1065), Schedule C and W-2 statements are submitted to the Financial Aid Office.*

☐ I/we **AM/ARE NOT FILING** a 2013 Federal tax return because I/we did not work during 2013, or

☐ I/we **AM/ARE NOT FILING** a 2013 Federal tax return because I/we worked in 2013 but was not required to file a tax return.
List your employers below whether or not you received W2 wage statements. If you did receive W2 wage statements, please forward copies of each to the Financial Aid Office.

Employer's Name	2013 Amount Earned
	$
	$
	$
	$

D. STUDENT FEDERAL TAX RETURN STATUS
(Check one of the boxes below)

☐ I **HAVE FILED** a 2013 Federal tax return
Complete the IRS data retrieval tool or order a copy of the tax RETURN transcript and submit to the Financial Aid Office along with copies of ALL W-2 wage statements, and/or Schedule K-1 (form 1065, if applicable), and Schedule C from the federal tax return.

___ **Please check here if you have completed or plan to complete the IRS Data Retrieval Tool once the student IRS tax return has been filed**
- To complete the IRS data retrieval tool, go to www.FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section at the top of the page. From there, follow the instructions to determine if the parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2013 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS data retrieval tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. Please view the instructional tutorial at www.saintmarys.edu/verification-changes for further details regarding the IRS data retrieval process.

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- To obtain an IRS tax **RETURN** transcript, go to www.irs.gov and click on the "Get transcript for my tax records" link, or call the IRS at 1-800-908-9946. Make sure you order the "IRS tax **RETURN** transcript" and **not** the "IRS tax ACCOUNT transcript." The student will need her Social Security number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2013 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers.

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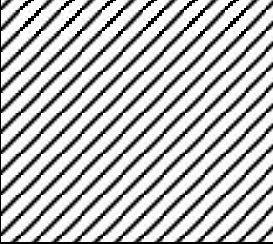
***Note the financial aid file will remain **incomplete** until the IRS Data Retrieval Tool is completed or a copy of the tax return transcript, a copy of Schedule K-1 (form 1065), Schedule C and W-2 statements are submitted to the Financial Aid Office.*

☐ I **AM NOT FILING** a 2013 Federal tax return because I did not work during 2013, or

☐ I **AM NOT FILING** a 2013 Federal tax return because I worked in 2013 but was not required to file a tax return.
List your employers below whether or not you received W2 wage statements. If you did receive W2 wage statements, please forward copies of each to the Financial Aid Office.

Employer's Name	2013 Amount Earned
	$
	$
	$
	$

E. OTHER FINANCIAL INFORMATION: ***<u>LEAVE NO ITEM SPACES BLANK</u>***

Please report **annual amounts** you received. **If an item does not apply to you, be sure to write 0 or N/A in those spaces for <u>both</u> the parent and student sections.**

PARENT(S)		STUDENT
$	Child support PAID to another household during 2013 (attach separate sheet if needed). Do not include support paid for children listed on section B on the first page of this form: Child _____ Age _____ Paid to _____ Child _____ Age _____ Paid to _____ Child _____ Age _____ Paid to _____	////////
$	Child support you RECEIVED for all children. Do not include foster care or adoption payments.	////////
$	Taxable earnings from need-based employment programs, such as Federal Work-Study Americorps and need-based portions of fellowships and assistantships.	$
$	Combat pay that was taxable and included in your adjusted gross income	////////
$	Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances	$
$	Food and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)	////////
$	Housing allowance paid to members of (select one): ___ the military or ___ clergy (including cash payments and cash value of benefits) Do not include value of on-base housing	$
$	Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) benefits	////////
$	Untaxed Social Security benefits	$
$	Other untaxed income not reported elsewhere (e.g., workers' compensation, disability, etc.) Do NOT include combat pay.	$

	Money received or paid on your behalf (e.g., bills), not reported elsewhere on this form	$

F. SIGN THIS STATEMENT *(We must have __both__ signatures.)*

We certify that all of the information reported on this statement, and all other documents we have submitted in order to qualify for federal, state, and institutional financial assistance, is true and complete to the best of our knowledge.

Student Signature   _____   Date _____

Parent Signature   _____   Date _____

Do not mail this form to the US Department of Education.
Submit this form to:
Saint Mary's College Financial Aid Office
141 Le Mans Hall
Notre Dame, IN 46556
Phone: (574) 284-4557
Toll free: (866) 502-7788
Fax: (574) 284-4818
You should make a copy of this form for your records

SAINT MARY'S COLLEGE VERIFICATION DEADLINE: MAY 15, 2014

*If we do not receive this form, all W2 wage statements, all required Schedules and either your IRS data retrieval or IRS Tax Return Transcript by May 15th, your financial aid package will not be sent before tuition bills are emailed to students in July *