Financial Aid

Verification Statement - Independent



<u>DO NOT LEAVE ANY ITEMS BLANK</u>. Incomplete forms will be returned to you. The priority deadline for all requested verification documents is <u>May 15</u>. If your completed documents are not received by May 15, your financial aid package <u>will not</u> 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.

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/Renti	ing	With Parents/Other Relatives

B. FAMILY INFORMATION

A. STUDENT INFORMATION

MAKE SURE YOU INCLUDE THE FOLLOWING IN THE GRID BELOW:

- ➤ Yourself
- ► Your spouse (if applicable)
- ➤ Your dependent children **IF** you (and/or your spouse) will provide more than half of their support from July 1, 2013 through June 30, 2014
- ▶ Other people 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, 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. STUDENT FEDERAL TAX RE	TURN STATUS
(Check one of the boxes be	elow)
☐ I HAVE FILED a 2013 Federal tax return Complete the IRS data retrieval tool or order a copy of the tax RETURN with copies of ALL W-2 wage statements, and/or Schedule K-1 (form 1 return.	· · · · · · · · · · · · · · · · · · ·
Please check here if you have completed or plan to co	mplete 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 "Make FAFSA Corrections," and navigate to the Financial there, follow the instructions to determine if the parent(s transfer 2013 IRS income tax information into the studen information to be available for the IRS data retrieval tool weeks for paper IRS tax return filers. Please view the instruction. 	Information section at the top of the page. From is) is eligible to use the IRS Data Retrieval Tool to to's FAFSA. It takes up to two weeks for IRS income for electronic IRS tax return filers, and up to eight ructional tutorial at
Please check here if you are unable or choose not to c	•
will instead submit a copy of the 2013 IRS tax RETURN tran	•
 To obtain an IRS tax RETURN transcript, go to www.irs.go records" link, or call the IRS at 1-800-908-9946. Make surthe "IRS tax ACCOUNT transcript." The student will need laddress on file with the IRS (normally this will be the additakes up to two weeks for IRS income information to be a eight weeks for paper tax return filers. 	e you order the "IRS tax RETURN transcript" and <u>not</u> her Social Security number, date of birth, and the ress used when the 2013 IRS tax return was filed). It
\square I have an EXTENSION to file a 2013 Federal tax return. The Θ	
Submit a copy of tax extension Form 4868 along with a written a gross income) and copies of all W-2 wage statements and/or Sch	-
**Note the financial aid file will remain incomplete until the IRS Data R transcript, W-2 statements and all required Schedules are submitted to	
☐ I AM NOT FILING a 2013 Federal tax return because I did not world	k during 2013, or
☐ I AM NOT FILING a 2013 Federal tax return because I worked in 20 List your employers below whether or not you received W2 wages state forward copies of each to the Financial Aid Office.	•
Employer's Name	2013 Amount Earned
	\$
	\$
	\$
	\$

	D. SPOUSE FEDERAL TAX RETU	RN STATUS		
(Check one of the boxes below)				
	I HAVE FILED a <i>SEPARATE</i> 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	s, if applicable), and Schedule C from the federal tax		
	<u>return.</u>			
	Please check here if you have completed or plan to comp	plete the IRS Data Retrieval Tool once your		
	IRS tax return has been filed			
	 To complete the IRS data retrieval tool, go to www.FAFSA.go "Make FAFSA Corrections," and navigate to the Financial Info there, follow the instructions to determine if the parent(s) is transfer 2013 IRS income tax information into the student's I information to be available for the IRS data retrieval tool for weeks for paper IRS tax return filers. Please view the instruct www.saintmarys.edu/verification-changes for further details 	ermation section at the top of the page. From eligible to use the IRS Data Retrieval Tool to FAFSA. It takes up to two weeks for IRS income electronic IRS tax return filers, and up to eight tional tutorial at		
	Please check here if you are unable or choose not to com	plete the IRS Data Retrieval Tool, and you		
	will instead submit a copy of the 2013 IRS tax RETURN transcr	ipt of the income tax return to the school		
	 To obtain an IRS tax RETURN transcript, go to www.irs.gov a records" link, or call the IRS at 1-800-908-9946. Make sure yo the "IRS tax ACCOUNT transcript." The spouse will need his S address on file with the IRS (normally this will be the address takes up to two weeks for IRS income information to be avai eight weeks for paper tax return filers. 	ou order the "IRS tax RETURN transcript" and <u>not</u> social Security number, date of birth, and the sused when the 2013 IRS tax return was filed). It		
	I have an EXTENSION to file a 2013 Federal tax return. The extension	ension expires:		
	Submit a copy of tax extension Form 4868 along with a written and gross income) and copies of all W-2 wage statements and/or Sched			
	**Note the financial aid file will remain incomplete until the IRS Data Retrictranscript, W-2 statements, and all required Schedules are submitted to the			
	I AM NOT FILING a 2013 Federal tax return because I did not work du	uring 2013, or		
_				
Ц	I AM NOT FILING a 2013 Federal tax return because I worked in 2013 List your employers below whether or not you received W2 wages statemed forward copies of each to the Financial Aid Office.	•		
	Employer's Name	2013 Amount Earned		
		\$		
		\$		
		\$		
		\$		

E. OTHER FINANCIAL INFORMATION: *** LEAVE NO ITEM SPACE BLANK***

Please report annual amounts you received. If an item does not apply to you, write 0 or N/A in those spaces.

	STUDENT AND SPOUSE
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 support you <u>RECEIVED</u> for all children. Do not include foster care or adoption payments.	\$
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based portions of fellowships and assistantships that were included in your adjusted gross income .	\$
Student grant/scholarship aid reported to the IRS in your adjusted gross income . Include AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship 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 food stamps) benefits	\$
Untaxed Social Security benefits	\$
Other untaxed income not reported elsewhere (e.g., workers' compensation, disability, etc.) Do NOT include student aid, Workforce Investment Act educational benefits, non-tax filers' combat pay, or benefits from flexible spending arrangements, e.g., cafeteria plans.	\$
Money received or paid on your behalf (e.g., bills), not reported elsewhere on this form	\$
F. SIGN THIS STATEMENT (We must have <u>both</u> signatures.) We cartifut that all of the information reported on this statement, and all other decuments we have submitted in or	dor to qualify for

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
-	
Spouse 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