

Your Free Application for Federal Student Aid (FAFSA) was selected for “verification.” In this process, the Financial Aid Office will compare information from your FAFSA with your 2020 IRS tax data or other financial documents. Federal student aid regulations mandate the collection of this information. Failure to complete verification will prevent you from receiving financial aid. We are required to send discrepant data to the FAFSA processor for correction.

**Step 1 – Student Identification**

\_\_\_\_\_ M \_\_\_\_\_  
 Last Name First Name MI Michigan Tech ID# Date of Birth

**Step 2 – Household Information**

List the people in your household by name, age, and relationship to you

- include yourself, and your spouse if you have one.
- include your children, if you will provide more than half of their support from July 1, 2022 through June 30, 2023, even if they do not live with you. Do not list foster children or children for whom you pay child support.
- include other people if they now live with you, you provide more than half of their support and will continue to provide more than half of their support from July 1, 2022 through June 30, 2023.
- include the full name of the college for any household member who will be attending at least half time between July 1, 2022 and June 30, 2023, and will be enrolled in a degree, diploma or certificate program.

Full Name	Age	Relationship	Full Name of College Attending in 2022-23
		Self	Michigan Technological University
More members—attach a separate sheet.			

Refer to enclosure *Instructions for Submitting 2020 Federal Tax Information or Proof of IRS Non-Tax Filing* to obtain further guidance on completing Steps 3 and 4.

**Step 3 - Student’s 2020 Income Information**

**Student - Did you file a 2020 Federal Income Tax Return?** Check one of the boxes below then continue to Step 4.

<input type="checkbox"/> Yes	IRS Data Retrieval was used to provide my 2020 tax information. <b>A copy of my W-2 form(s) and/or Schedule(s) C [business owners], F [farmers], K-1 (Form 1065) [partnerships]</b> have been or will be submitted.												
<input type="checkbox"/> Yes	A <b>signed</b> copy of the 2020 tax return was or will be submitted along with a <b>copy of my W-2 form(s) and/or K-1 (Form 1065) [partnerships]</b> . Note: the copy must include pages 1 & 2 of the federal 1040 form along with Schedules 1, 2, 3, C, and F. Married students who file separate returns must provide a return with schedules for each filer.												
<input type="checkbox"/> Yes	A 2020 <u>IRS Tax Return Transcript</u> was or will be submitted along with a <b>copy of my W-2 form(s) and/or K-1 (Form 1065) [partnerships]</b> . Married students who file separate returns must provide a transcript for each filer. Do <u>not</u> submit the IRS Tax <u>Account</u> Transcript.												
<input type="checkbox"/> No	I had no source of income in calendar year 2020. I certify that I did not file and was not required to file a 2020 IRS Tax Return; tax return with a foreign nation, U.S. Territory, or U.S. Commonwealth. <b>I will provide a Verification of Non-filing Letter from the IRS.</b> Work-study is a source of earned income.												
<input type="checkbox"/> No	I received the following source(s) of income during calendar year 2020. I certify that I did not file and was not required to file a 2020 IRS Tax Return; tax return with a foreign nation, U.S. Territory, or U.S. Commonwealth. <b>I will provide a Verification of Non-filing Letter from the IRS along with copies of W-2 form(s) for all sources of earned income.</b>												
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Source	Amount	Source	Amount										
	\$		\$										
	\$		\$										

**Step 4 – Student’s Spouse’s 2020 Income Information** If unmarried, continue to Step 5.

**Student’s Spouse - Did you file a 2020 Federal Income Tax Return?** Check one of the boxes below then continue to Step 5.

<input type="checkbox"/> Yes	IRS Data Retrieval was used to provide my 2020 tax information. <b>A copy of my W-2 form(s) and/or Schedule(s) C [business owners], F [farmers], K-1 (Form 1065) [partnerships]</b> have been or will be submitted.												
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	\$		\$										

**Step 5 – Student (and if married Spouse) must respond to the following untaxed income questions.** Do not leave any items blank. If your answer to any question is none, write a “0” in the space provided. **Incomplete forms will be returned.**

Student	Spouse	Report annual amounts for calendar year 2020.
\$	\$	Payments to tax-deferred pension and retirement savings plans [(401(k), 403(b), etc.) paid directly or withheld from earnings, include amounts reported on the W-2 form, Boxes 12a - 12d, codes D, E, F, G, H and S. Do <u>not</u> include DD (employer contributions toward employee health benefits).
\$	\$	Child support <b>received</b> for all children. Include court ordered and amounts voluntarily provided. <b>Report the total amount received for 2020.</b> Do not report the monthly amount.
\$	\$	Other untaxed income or benefits such as workers’ compensation, disability (not Social Security), housing, food & other living allowances paid to members of the military or clergy, untaxed portions of HSA’s (IRS Form 1040 Schedule 1, Line 12), veterans non-education benefits (Death Pension, DIC, VA Work-Study Allowances), etc. <b>Identify the source(s):</b>
\$	\$	Cash support or money paid on your behalf (e.g., bills). This includes money received from a parent that was not part of a legal child support agreement. Include any distributions from a 529 plan that is owned by someone other than you.
<p><b>Do not include:</b> Extended foster care benefits, student aid, unemployment compensation, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, SSI, combat pay, on-base military housing or military housing allowance, federal veterans educational benefits (Montgomery GI Bill, Post-9/11 GI Bill, etc.), WIOA educational benefits, cafeteria plan benefits, adoption assistance, foreign income exclusion or credit for federal tax on special fuels.</p>		

**Step 6 – Student (and/or Spouse) - Complete only if you paid (not received) child support during 2020.**

Name of person who paid child support	Name of person who received payment	Name and age of child	Annual amount paid per child
			\$
			\$

**Step 7 – Sign this worksheet**

Certification: By signing this verification worksheet, I certify that all the information reported on it is complete and correct.

Student’s Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail or both.** This form can be mailed to: Michigan Technological University, Student Financial Services Center, 1400 Townsend Dr., Houghton, MI 49931-1295; faxed to 906-487-3042, or uploaded through [mymichigantech.mtu.edu](http://mymichigantech.mtu.edu)