



## 2026-2027 Verification Worksheet – Independent

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 2024 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. Refer to enclosure ***Instructions for Submitting 2024 Federal Tax Information*** to obtain further guidance on completing Steps 3 and 4.

## Step 1 – Student Identification

\_\_\_\_\_  
Last Name      First Name      MI      M \_\_\_\_\_ 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, 2026 through June 30, 2027, even if they do not live with you.
- 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, 2026 through June 30, 2027.

### Step 3 – Student 2024 Income Information

Check **ONLY** the **ONE** box that applies to the **Student's 2024 Federal Income Tax filing status**.

<input type="checkbox"/>	2024 IRS tax data was supplied at FAFSA filing using the IRS Direct Data Transfer.
<input type="checkbox"/>	A <u>signed</u> copy of the <b>2024</b> tax return was or will be submitted. The signed copy must include pages 1 & 2 of the federal 1040 form along with all pages of Schedules 1, 2, 3, C, and F, if applicable.
<input type="checkbox"/>	A <b>2024 IRS Tax Return Transcript</b> was or will be submitted. Do <u>not</u> submit an IRS Tax <u>Account</u> Transcript.
<input type="checkbox"/>	I had no source of income in calendar year <b>2024</b> . I certify that I did not file and was not required to file a <b>2024</b> IRS Tax Return, tax return with a foreign nation, U.S. Territory, or U.S. Commonwealth. Work-study is a source of earned income.
<input type="checkbox"/>	I did have income during calendar year <b>2024</b> ; however, I certify that I did not file and was not required to file a <b>2024</b> IRS Tax Return, tax return with a foreign nation, U.S. Territory, or U.S. Commonwealth. <b>I will list all sources of income below and will provide copies of W-2 form(s) for each source.</b>
Student Source(s) of 2024 Income	Amount
	\$
	\$

### Step 4 – Spouse 2024 Income Information

Check **ONLY** the **ONE** box that applies to the **Spouse's 2024 Federal Income Tax filing status**.

<input type="checkbox"/>	2024 IRS tax data was supplied at FAFSA filing using the IRS Direct Data Transfer.
<input type="checkbox"/>	A <u>signed</u> copy of the <b>2024</b> tax return was or will be submitted. The signed copy must include pages 1 & 2 of the federal 1040 form along with all pages of Schedules 1, 2, 3, C, and F, if applicable. (Married students who file separate returns must provide a return with schedules for each filer.)
<input type="checkbox"/>	A <b>2024 IRS Tax Return Transcript</b> was or will be submitted. Do <u>not</u> submit an IRS Tax <u>Account</u> Transcript. (Married students who file separate returns must provide a transcript for each filer.)
<input type="checkbox"/>	I had no source of income in calendar year <b>2024</b> . I certify that I did not file and was not required to file a <b>2024</b> IRS Tax Return, tax return with a foreign nation, U.S. Territory, or U.S. Commonwealth. Work-study is a source of earned income.
<input type="checkbox"/>	I did have income during calendar year <b>2024</b> ; however, I certify that I did not file and was not required to file a <b>2024</b> IRS Tax Return, tax return with a foreign nation, U.S. Territory, or U.S. Commonwealth. <b>I will list all sources of income below and will provide copies of W-2 form(s) for each source.</b>
Spouse Source(s) of 2024 Income	Amount
	\$
	\$

### Step 5 – Student must sign this worksheet

**Certification:** By signing this verification worksheet, I certify that all of the information reported on it is complete and correct. Electronic or typed signatures are not acceptable.

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, Financial Aid Office, 1400 Townsend Dr., Houghton, MI 49931-1295; faxed to 906-487-3042, or uploaded through [apps.mtu.edu/finaid](http://apps.mtu.edu/finaid)