

2023 - 2024
Verification Worksheet
Independent
(V1)

Your application has been selected for review by the federal government in a process called "Verification". The law requires that the information from your FAFSA be compared with your and your spouse's (if applicable) Federal IRS tax information as well as other financial documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach all required documents and submit to the Financial Aid Office.

STUDENT INFORMATION

Last Name	First Name	M.I.	CWID Number
Address (include apartment number)			Social Security Number
City	State	Zip	Phone number (include area code)

FAMILY INFORMATION

List all of the people in your household for the year July 1, 2023 through June 30, 2024. **INCLUDE YOURSELF, YOUR SPOUSE (if applicable), YOUR CHILDREN AND ANY OTHERS WHO RECEIVE MORE THAN HALF OF THEIR SUPPORT FROM YOU.** List the name of the college others will be **attending if they are enrolled in a degree, diploma, or certificate program for at least six credits per term between July 1, 2023 and June 30, 2024.**

Name	Age	Relationship to you	College Attending
		Self	Montclair State

INCOME VERIFICATION

If you did not use the IRS DRT (Data Retrieval Tool) on your FAFSA, you and your spouse must verify the income by submitting a complete 2021 Federal 1040 Tax Return.



Last Name

First Name

M.I.

CWID Number

STUDENT (AND SPOUSE) INCOME

- ☐ I used the IRS Data Retrieval process when completing/updating the 2023 - 24 FAFSA.
- ☐ My and my spouse's (if applicable) 2021 Federal IRS 1040 Tax Return(s) is/are attached. **See Income Verification section above for important details.** [Foreign tax return filers may submit signed photocopies.]
- ☐ I will not file and am not required to file a 2021 Federal tax return. I have attempted to obtain a copy of the Verification of Non-filing from IRS but have not been able to do so. (If you did not file a tax return, but had earnings from work, please list each Employer, even if you did not receive an IRS W-2 form).

<i>Name of Employer</i>	<i>Amount Earned in 2021</i>	<i>IRS W-2 Must be Submitted</i>

- ☐ My spouse will not file and is not required to file a 2021 Federal tax return. I (the spouse) have attempted to obtain a copy of the Verification of Non-filing from IRS but have not been able to do so. (If your spouse did not file a tax return, but had earnings from work, please list each employer, even if they did not receive an IRS W-2 form).

<i>Name of Employer</i>	<i>Amount Earned in 2021</i>	<i>IRS W-2 Must be Submitted</i>

UNTAXED INCOME – Student (and Spouse, if applicable)

List all sources of Student/Spouse untaxed income—report total received in 2021 (*enter 0 if none received*):

Source of Untaxed Income	2021 Total	Source of Untaxed Income	2021 Total
401(k)/403(b) contribution (Box 12a – 12d on W-2 Codes D, E, F, G, H, and S)		Untaxed IRA distribution or pensions (refer to 1040 line 4a-4b). Exclude rollovers	
IRA Deductions/payments to SEP, SIMPLE, Keough (Schedule 1 line 16)		Worker's compensation	
Child support received for the year		Disability benefits (not from Social Security)	
Tax exempt interest (1040 line 2a)		Housing, food, and other living allowances paid to members of the military, clergy, etc.	
Veteran's Non-Education Benefits		Earnings Not Included On Tax Return	
Untaxed portion of health savings account (1040 Schedule 1 line 13)		Money received or paid on your behalf not reported elsewhere	

CERTIFICATIONS AND SIGNATURES

Each person signing this worksheet certifies that all of the information reported is complete and correct. I/We also acknowledge that I/we have read and agree to comply with all verification policies as stated by the University. **Failure to submit information in a timely fashion may result in the application being filed as inactive** with no further consideration and no federal aid for the academic year. Student and spouse (if applicable) must sign:

Student

Date

Spouse

Date

NOTE: Computer generated signature is not acceptable.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.