

2024-2025 Verification Worksheet - Independent

Please Return To:

Office of Financial Assistance Dropbox https://www1.villanova.edu/content/university/office-offinancial-assistance/dropbox-and-important-forms.html

Step 1 – Student Information:

Last Name

First Name

Villanova University Student ID Number

Step 2 – Family Size Information -You Must Complete Each Section

In the chart below please include:

- Yourself, the student
- The student's spouse, if applicable
- The student's dependent children if the following are true:
 - \circ They live with the student (or live apart because of college enrollment);
 - \circ $\;$ They receive more than half of their support from the student; and
 - They will continue to receive more than half their support from the student during the award year.
- Other persons if the following are true:
 - They live with the student;
 - They receive more than half of their support from the student; and
 - They will continue to receive more than half their support from the student during the award year.

• DO NOT LEAVE ANY SECTION BLANK (age, relationship, etc.)

Full Name	Age	Relationship*
		SELF

*Relationship options: student, parent/stepparent, brother/sister, student's spouse, student's child, grandparent, etc.

Step 3 – Rollover in 2022

Did the student have a rollover from an IRA, annuity or pension in 2022?

Yes No

If yes, what was the amount of the rollover?

Did the student's spouse, if applicable, have a rollover from an IRA, annuity, or pension in 2022?

Yes No

If yes, what was the amount of the rollover?

Step 4-Student's Tax Filing Status – Calendar Year 2022

Have you or will you be required to file a 2022 US Federal Income Tax Return or Foreign National Tax Return?

_YES. Submit the IRS Data Retrieval Tool through your FAFSA or submit your IRS Tax Return Transcript, which you
can request from the IRS at https://www.irs.gov/individuals/get-transcript. Continue to Step 4

NO, **but I had some earnings from work.** Complete, and submit a *Student Non-Tax Filer's Statement*, which is available on the Office of Financial Assistance's website. Be sure to include all W-2 and 1099 forms you received. You must also submit an *IRS Verification of Non-filing Letter*, which you can request from the IRS at https://www.irs.gov/individuals/get-transcript. Continue to Step 5.

NO, and I had no earnings from work. Complete, and submit a *Student Non-Tax Filer's Statement*, which is available on the Office of Financial Assistance's website. You must also submit an *IRS Verification of Non-filing Letter*, which you can request from the IRS at <u>https://www.irs.gov/individuals/get-transcript</u>. Continue to Step 5, if applicable, or Step 6.

Step 5 – Spouse's Tax Filing Status – Calendar Year 2022

If you are married, has your spouse filed or will be required to file a 2022 US Federal Income Tax Return or Foreign National Tax Return?

YES. Submit the *IRS Data Retrieval Tool* through your FAFSA or submit your *IRS Tax Return Transcript*, which you can request from the IRS at <u>https://www.irs.gov/individuals/get-transcript</u>. Continue to Step 5.

NO, **but I had some earnings from work.** Complete, and submit a *Non-Tax Filer's Statement*, which is available on the Office of Financial Assistance's website. Be sure to include all W-2 and 1099 forms you received. You must also submit an *IRS Verification of Non-filing Letter*, which you can request from the IRS at https://www.irs.gov/individuals/get-transcript. Continue to Step 5.

NO, and I had no earnings from work. Complete, and submit a *Non-Tax Filer's Statement*, which is available on the Office of Financial Assistance's website. You must also submit an *IRS Verification of Non-filing Letter*, which you can request from the IRS at <u>https://www.irs.gov/individuals/get-transcript</u>. Continue to Step 6.

Step 6 – Certification

By signing this worksheet, I certify all the information reported is complete and correct (the student and at least one parent must sign. Must be a wet signature, you cannot electronically sign this form):

Student Signature

VERIFD 11.6.23

Date