



## Verification of Household Size & Income 2017-18 ■ Dependent Student

Your 2017-18 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. Read the instructions carefully and answer all questions. **DO NOT LEAVE ITEMS BLANK.** Incomplete responses will delay processing. Return completed form, with all requested documents and signatures, to the address listed above. Write your name and MSU ID number in ink on all documents. **Please allow at least 4-6 weeks for processing.** If you have questions, contact the Office of Financial Aid Services.

Student Name: \_\_\_\_\_ MSU ID \_\_\_\_\_

E-mail Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

**1. Household Information: List the people in your parent(s)' household.**

- **yourself**, even if you do not live with them while attending college;
- **your parent(s)**; if legal parents are divorced or separated AND not living together, list the parent (and stepparent) you lived with more during the past 12 months. If you did not live with one parent more than the other, report the parent (and stepparent) who provided more financial support during the past 12 months or during the most recent year that you actually received support from a parent, *AND*
- **your parent(s)' other children** even if they don't live with your parent(s) if (a) your **parent(s) will provide more than half of their support** from July 1, 2017 through June 30, 2018, or (b) the children would be required to provide parental information when applying for Federal Student Aid, *AND*
- other people if they now live with your parent(s) *AND* your parent(s) provide more than half of their support and will continue to provide more than half of their support from July 1, 2017 through June 30, 2018.

Full Name	Age	Date of Birth (MM-DD-YY)	Relationship to Student	Name of College (must be enrolled at least half-time between July 1, 2017 and June 30, 2018 in a degree, diploma, or certificate program)
			<i>self</i>	

(If you need more space, attach a separate page.)

**2. Parent(s)' Marital Status *as of the date FAFSA was filed* (check one):**

- Single     
  Married/Remarried     
  Divorced/ or widowed     
  Separated  
 Effective Month and Year of marital status above: \_\_\_\_\_

**3. Student 2015 Income Tax Information**

- Check here if you filed a 2015 IRS Income Tax Return (includes IRS form 1040, 1040A, 1040EZ, or foreign income tax return) **and used the IRS Data Retrieval Tool** to retrieve and transfer 2015 income to your FAFSA.

***If you checked this option, proceed to Number 4.***

Check here if you filed a 2015 IRS Income Tax Return (includes IRS form 1040, 1040A, 1040EZ, or foreign income tax return) **but did not use the IRS Data Retrieval Tool** to retrieve and transfer 2015 income to your FAFSA. Attach a copy of your **2015 IRS tax return transcript**. **We do not accept copies of federal or state tax returns.** (see Notes on page 2 on how to obtain IRS tax transcripts).

**If you checked this option, proceed to Number 4.**

**Check here if you will not file, and are not required to file, a 2015 IRS Income Tax Return.**

List below any income received in 2015 (wages, dividends, interest income, etc.). If you had wages, provide employer name(s) and submit copies of all 2015 W-2 forms. If you had no income, please write in "no income" or "did not work."

(see Notes below on how to obtain W-2 alternative documentation).

Employer(s) or other source of income:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Amount Earned in 2015:

\$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_

#### 4. Parent(s) 2015 Income Tax Information

Check here if your parents filed a 2015 IRS Income Tax Return (includes IRS form 1040, 1040A, 1040EZ, or foreign income tax return) **and used the IRS Data Retrieval Tool** to retrieve and transfer 2015 income to your FAFSA.

**If you checked this option, proceed to Number 5.**

**Check here if your parent(s) filed a 2015 IRS Income Tax Return** (includes IRS form 1040, 1040A, 1040EZ, or foreign income tax return) **but did not use the IRS Data Retrieval Tool** to retrieve and transfer 2015 income to your FAFSA. Attach a copy of your parent(s)' **2015 IRS tax return transcript**. **We do not accept copies of federal or state tax returns.**

(see Notes on page 2 on how to obtain IRS tax transcripts).

**If you checked this option, proceed to Number 5.**

**Check here if your parent(s) will not file, and are not required to file, a 2015 IRS Income Tax Return.**

List below any income received in 2015 (wages, dividends, interest income, etc.). If you had wages, provide employer name(s) and submit copies of all 2015 W-2 forms. If you had no income, please write in "no income" or "did not work."

(see Notes below on how to obtain W-2 alternative documentation).

Employer(s) or other source of income:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Amount Earned in 2015:

\$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_

#### 5. Certification and Signature(s)

I/We hereby certify that all the information reported is complete and accurate.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent Signature: \_\_\_\_\_ Date: \_\_\_\_\_

#### NOTES:

- To obtain an IRS Tax Return Transcript, go to [www.irs.gov](http://www.irs.gov). Click on "Get My Tax Record" and follow instructions, or call 1-800-908-9946.
- If you are a victim of IRS tax-related identity theft and can not obtain a tax return transcript, you may have to contact the IRS Identity Protection Specialized Unit (IPSU) at 800-908-4490 to obtain an alternate tax transcript called Tax Return Database View (TRDBV). Please also submit a signed and dated statement that you are a victim of IRS tax-related identity theft and are working with the IRS for resolution.
- If you amended your 2015 IRS Income Tax Return, you must also submit a signed copy of your 2015 IRS Form 1040X along with 2015 IRS tax *account* transcript.
- In lieu of W2s, you may obtain an IRS Wage and Income Transcript(s).
- If you or your parents(s) did not answer the asset information questions on the FAFSA (questions 41 through 43 and 90 through 92) and you (or your parent(s)) were required to file an IRS Tax Form 1040, you may be required to submit the Dependent Asset Information Form. You can fill out and submit this form with your other verification materials. The asset form is located here: [www.montana.edu/wwwfa/forms.html](http://www.montana.edu/wwwfa/forms.html)