



2020-21 Verification Household Size and Income

Office of Financial Aid Services

P.O. Box 174160

Bozeman, MT 59717-4160 Tel: (406) 994-2845

Location: 21 Montana Hall Fax: (406) 994-6962

Student Name: _____ MSU ID _____

E-mail Address: _____ Phone Number: _____

HOUSEHOLD INFORMATION (List all family members for the period of July 1, 2020 through June 30, 2021.)

Include everyone that you (or your spouse if married, or the parent(s) you reported on your FAFSA) support more than 50% financially. List the name, age, date of birth, and relationship to you (the student). Also include the name of a college for someone if he/she is 1) attending at least half-time, 2) in a degree or certificate program, and 3) not a parent.

TIPS:

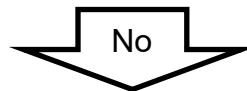
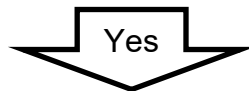
- Always include **yourself** (and your spouse, if married).
- Include the **parent(s)** you are required to report on the FAFSA. This may include a step-parent.
- Include your (and your spouse's) **children** for whom you provide more than 50% support during the dates listed above.
- If parental information is reported on your FAFSA, include that parent(s)' **other children** for whom they will provide more than 50% financial support during the dates listed above,
- Include **other people** if they now live with you (or your parents on the FAFSA) if you or your parents will provide more than 50% support during the dates listed above,

| Full Name | Age | Date of Birth (MM-DD-YY) | Relationship to Student | Name of College | Will be Enrolled at Least Half Time (Yes or No) |
|-----------|-----|--------------------------|-------------------------|-----------------|---|
| | | | self | MSU - Bozeman | |
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(If you need more space, attach a separate page with the student's name and ID number at the top.)

STUDENT INCOME INFORMATION

Did you file a 2018 Tax Return (USA or other country)?



Check the box that applies:

- I (and spouse, if applicable) **have used** the IRS Data Retrieval Tool to transfer 2018 tax return information into the FAFSA.
- I (and spouse, if applicable) **am unable or choose not to use** the IRS Data Retrieval Tool.

Please provide a **2018 IRS tax return transcript(s)**. (See [How to Get IRS Documents](#) in our Forms page.)

NOTE: If you filed a foreign tax return please contact our office for instructions.

NOTE: If you amended your 2018 IRS Income Tax Return, you must also submit a signed copy of the 2018 IRS Form 1040X in addition to the tax return transcript. The 1040X is the "Amended US Individual Income Tax Return," filed with the IRS.

****Please note, for security purposes we cannot take Tax Documents via email.****

Check the box that applies:

- I (and spouse, if applicable) **had no income in 2018.**

Please provide a **Verification of Non-Filing Letter for tax year 2018** from the IRS. (See [How to Get IRS Documents](#) in our Forms page)

NOTE: If you are required to provide parental information on your FAFSA, you, **do not** need to submit an IRS non-filing letter.

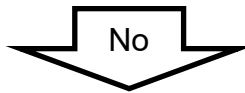
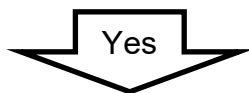
- I (and spouse, if applicable) **was employed and had income in 2018 but did not file a 2018 tax return.**

Please provide copies of all 2018 IRS W-2 forms you received and a **Verification of Non-Filing Letter for tax year 2018** from the IRS. (See [How to Get IRS Documents](#) in our Forms page) If you had income in 2018 but no W2s, attach a statement with explanation.

NOTE: If you are required to provide parental information on your FAFSA, you **do not** need to submit an IRS non-filing letter.

PARENT INCOME INFORMATION: Check the box that applies. This section applies only to the parent(s) reported on your FAFSA. If you are not required to report FAFSA parent information, skip this section and proceed to Certification and Signatures.

Did your parents file a 2018 Tax Return (USA or other country)?



Check the box that applies:

- My parent(s) **have used** the IRS Data Retrieval Tool to transfer 2018 tax return information into the FAFSA.
- My parent(s) **are unable or chooses not to use** the IRS Data Retrieval Tool.

Please provide a **2018 IRS tax return transcript(s)**. (See [How to Get IRS Documents](#) in our Forms page.)

NOTE: If your parent(s) filed a foreign tax return please contact our office for instructions.

NOTE: If your parent(s) amended their 2018 IRS Income Tax Return, they must also submit a signed copy of the 2018 IRS Form 1040X in addition to the tax return transcript. The 1040X is the "Amended US Individual Income Tax Return," filed with the IRS.

Check the box that applies:

- My parent(s) **had no income in 2018**.

Please provide a **Verification of Non-Filing Letter for tax year 2018** from the IRS. (See [How to Get IRS Documents](#) in our Forms page)

- My parent(s) **were employed and had income in 2018 but did not file a 2018 tax return**.

Please provide copies of all 2018 IRS W-2 forms they received and a **Verification of Non-Filing Letter for tax year 2018** from the IRS. (See [How to Get IRS Documents](#) in our Forms page) If they had income in 2018 but no W2s, attach a statement with explanation.

Please note, for security purposes we cannot take Tax Documents via email.

Certification and Signature(s)

Each person signing this form certifies that all of the information reported is complete and accurate. The student and spouse, if married, or one parent, if parent(s) are required to be reported on the FAFSA, must sign and date.

Per federal regulations, if you purposely give false or misleading information, you may be fined, sent to prison, or both.

****We do not accept electronic signatures****

Student Signature: _____ Date: _____

Parent or Spouse Signature: _____ Date: _____

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 2-4 weeks for processing.** If you have questions, contact the Office of Financial Aid Services.

Notes or explanations as needed: