

Your Free Application for Federal Aid (FAFSA) was selected for review in a process called verification. Before awarding Federal Student Aid, we must ask you to confirm the information you reported on your FAFSA. We will compare your FAFSA with the information you report on this and any other required documentation. If there are differences, your FAFSA information may need to be corrected. You and the parent whose information was reported on the FAFSA must complete and sign this worksheet and submit it to our office to avoid any delay in processing your request for financial aid. Contact our office if you have any questions regarding this form at 510.879.9200. Submit this completed form with any required documents to the Financial Aid Office by email to: FinAid@samuelmerritt.edu.

A. Student Name : (please print)

Last Name	First Name	Middle Initial
Address	City, State	ZIP
Student ID#	Date of Birth	Phone Number

- **B.** Household Size: List the people living in your parent(s) household, including:
 - Yourself
 - your parent(s) (including a stepparent) even if you don't live with your parent(s)
 - Other children that your parent(s) provide more than half of their support and will continue to provide more than half of their support from July 1, 2023 through June 30, 2024 (even if they do not live with your parent(s)).
 - Other people living in your parent(s) household and your parent(s) provide more than half of their support.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half-Time (Yes or No)

C. Student Tax Information:

_____ Check here if you have used the IRS Data Retrieval tool and the information is unchanged.

_____ Check here if you are attaching a 2021 IRS Tax Return Transcript or a signed copy of the signed 2021 income tax return and applicable schedules.

_____ Check here if you will not file and are not required to file a 2021 U.S. Income Tax return. If not filing, please complete a Non-Tax Filer Form found at <u>http://www.samuelmerritt.edu/financial_aid/forms</u>

D. Parent(s) Tax Information:

_____ Check here if you have used the IRS Data Retrieval tool and the information is unchanged.

_____ Check here if you are attaching a 2021 IRS Tax Return Transcript or a signed copy of the signed 2021 income tax return and applicable schedules.

_____ Check here if you will not file and are not required to file a 2021 U.S. Income Tax return. If not filing, please complete a Non-Tax Filer Form found at <u>http://www.samuelmerritt.edu/financial_aid/forms</u>

A 2021 IRS Tax Return Transcript may be obtained through:

- <u>Get Transcript by Mail</u> Go to <u>www.irs.gov</u>, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and *NOT* the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- <u>Get Transcript Online</u> Go to <u>www.irs.gov</u>, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and *NOT* the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- <u>Automated Telephone Request</u> 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- <u>Paper Request Form</u> IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

If the parents filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and the **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** must be provided for each.

- Check here if a 2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules is provided.
- Check here if a 2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules will be provided later.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide **both** of the following:

- 1. A Tax Return Data-Base View (TRDBV) transcript obtained from the IRS for year 2021; contact the IRS at 1-800-908-4490;
- 2. A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2021 must provide both of the following:

- 1. A 2021 IRS Tax Return Transcript (signature not required); OR a signed copy of the 2021 Income Tax Return and All Schedules you and your parents completed: AND
- 2. A signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Individuals Who Filed Non-IRS Income Tax Returns

A tax filer who filed a 2021 income tax return with a tax authority other than the IRS may provide a **signed** copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority.

Signatures:

Each person signing this form certifies that all the information reported on is complete and correct. The student and one parent must sign and date the form.

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

Student

Date

Parent

Date