

# Wellesley College Dependent Student Verification Worksheet

Your application has been selected for a Federal process called "verification." In this process, Wellesley College will compare information from your FAFSA and Profile to 2011 tax information obtained from the IRS, W-2 forms, and other financial documents, including this worksheet. Federal regulations state that Wellesley College has the right to ask you for this information before awarding or disbursing any Federal financial aid. Any corrections to your FAFSA will be sent electronically from SFS to the Department of Education for reprocessing.

Important changes for 2012-2013: Federal regulations now require that tax information be obtained directly from the IRS either through use of the IRS Data Retrieval Tool on the FAFSA on the Web (preferred method) or by requesting a tax transcript from the IRS and submitting it to SFS with this form.

What you should do:

- 1.) Collect information that you will need to complete this form (such as your parents' and your tax returns and W-2s).
- 2.) Complete and sign the worksheet (if dependent, at least one parent must also sign the form).
- 3.) Submit the worksheet and any required supplementary information to Student Financial Services.
- 4.) Once all tax returns are filed electronically, wait approximately 2 weeks (8 weeks if filing by paper) and then update your FAFSA by choosing the IRS Data Retrieval Tool. Or you may request an IRS tax transcript and submit it to SFS.

## Section 1: Wellesley Student Information

|                         |            |     |
|-------------------------|------------|-----|
| Last Name               | First Name | MI  |
| Address (include apt #) |            |     |
| Address (continued)     |            |     |
| City                    | State      | Zip |

|                       |
|-----------------------|
| Wellesley ID Number   |
| Date of Birth         |
| Phone Number          |
| Student Email Address |

## Section 2: Family Information

List the following members of your parents' household:

- You and your parents (include stepparent)
- Your parents' other children ONLY IF a.) the parent(s) listed will provide at least half of their support from July 1, 2012 to June 30, 2013, OR b.) the children would be required to provide parental information when applying for federal student aid.
- Any 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, 2012 to June 30, 2013.

Write the names of all household members that meet the criteria above. Also, write in each person's age and relation to you (the student). Indicate each person (excluding parents) who will be enrolled **at least half-time** in a higher education degree or certificate program during the period of July 1, 2012 to June 30, 2013 by writing the name of the college or university the s/he will attend. Attach an additional page, if needed.

| Full Name | Age | Relationship | College Name (enrolled 12-13) | Enrolled at least half-time |
|-----------|-----|--------------|-------------------------------|-----------------------------|
|           |     | Self         | Wellesley College             | Yes                         |
|           |     |              |                               |                             |
|           |     |              |                               |                             |
|           |     |              |                               |                             |
|           |     |              |                               |                             |
|           |     |              |                               |                             |
|           |     |              |                               |                             |
|           |     |              |                               |                             |

### Section 3: Student Tax Information

- ☐ Check here if you already submitted your W-2s to IDOC.
- ☐ Check here if you have NO W-2s.
- ☐ Check here if you will NOT file and are not required to file a 2011 US Income Tax Return (complete the following):

| Student's Income (use W-2 form or other earning statements) – state the source of income | Amount |
|--|--------|
|  | \$     |
|  | \$     |

### Section 4: Parent Tax Information

- ☐ Check here if you already submitted your parent(s) W-2s to IDOC.
- ☐ Check here if your parent(s) have NO W-2s (unemployed, self-employed, etc).
- ☐ Check here if your parent(s) will NOT file and are not required to file a 2011 US Income Tax Return (complete the following):

| Parent(s)' Income (use W-2 form or other earning statements) – state the source of income | Amount |
|---|--------|
|   | \$     |
|   | \$     |

### Section 5: Untaxed Income – Enter a dollar value or zero for each data element.

| 2011 Untaxed Income  | Parent | Student |
|--|--------|---------|
| Untaxed portions of IRA distributions from IRS form 1040, line 15a minus 15b or 1040A, line 11a minus 11b. Exclude rollovers. Enter zero, if negative. | \$     | \$      |
| Untaxed portions of pensions from IRS form 1040, line 16a minus 16b or 1040A, line 12a minus 12b. Exclude rollovers. Enter zero, if negative.          | \$     | \$      |
| Education tax credits from IRS 1040, line 49 or 1040A, line 31.  | \$     | \$      |
| IRS deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans, from IRS form 1040 lines 28 and 32 (or 1040A line 17).  | \$     | \$      |
| Tax-exempt interest income, from IRS form 1040 or 1040A line 8b.   | \$     | \$      |
| <b>Totals</b>  | \$     | \$      |

### Section 6: Food Stamp Benefits – Calendar Years 2010 and 2011

Did your parent(s) receive Supplemental Nutrition Assistance Program (SNAP) benefits (Food Stamps) in 2010 or 2011?

- ☐ Yes ☐ No

### Section 7: Child Support Paid – Calendar Year 2011

Did your custodial parent(s) pay child support during 2011? (Do not include support for any children listed in Section 2 above).

- ☐ Yes – Complete the table below.
- ☐ No

| Amount of Support Paid | Paid To: | Paid for (child name): |
|------------------------|----------|------------------------|
| \$                     |          |                        |
| \$                     |          |                        |

### Section 8: Certification

By signing this worksheet, we certify that all information reported is complete and correct. We understand that purposely providing false information on this worksheet may result in fines, imprisonment, or both. In addition, all institutional aid eligibility will be forfeited. At least one parent must sign this form. Failure to complete this form in its entirety may cause processing delays.

Signature of Student \_\_\_\_\_ Date \_\_\_\_\_

Signature of Parent \_\_\_\_\_ Date \_\_\_\_\_