

Alderson Broaddus University 2021-22 Verification - Independent V1

Your student aid application was selected for review by the U.S. Department of Education. AB is required by federal law to compare your application with information on this worksheet and with your **2019 federal tax documents**.

Once complete, necessary corrections will be submitted to the Central Processing System and you will receive an amended Student Aid Report (SAR) including required adjustments to your Expected Family Contribution (EFC). It is possible that Verification can change your financial aid award. FAO will contact you when the process is complete.

The Financial Aid Office (FAO) encourages you to **complete verification immediately as, by law, your financial aid cannot be transmitted to your student bill until verification is complete**. AB **priority deadline** for completing the verification process is **May 31, 2021**. Completing the process after this date may result in ineligibility for certain types of financial aid.

The **final deadline** to complete the verification process is established by the Federal government and published in the Federal Register on an annual basis – www.federalregister.gov/.

IMPORTANT: YOUR FINANCIAL AID IS ON HOLD UNTIL VERIFICATION IS COMPLETED!
WARNING: VERIFICATION RESULTS MAY AFFECT YOUR FINANCIAL AID

A. Student Information

First Name	Middle Initial	Last Name	Birthdate	AB Student ID
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B. Family Information - Number in Household and Number in College

List below the people who reside in your household. Also list age of each person, relationship to you (the student) and name of school a spouse or dependent who will be attending at least half time in a degree, diploma or certificate program any time between 7/1/21-6/30/22. Read below to understand who you are to include in the household:

- **The student** (*yourself*)
- **Your spouse** (*if applicable*)
- **Your children** *if you provide more than half support or they would be required to give parental information on the FAFSA*
- **Other people you support** *if they now live with you and you provide more than half of their support and will continue to provide more than half of their support July 1, 2021 through June 30, 2022.*

	Name	Age	Relationship to Student	Name of College if enrolled at least half time 2021-22
1			Myself	Alderson Broaddus University
2				
3				
4				
5				
6				

C. STUDENT (and Spouse if applicable) Tax Filing Status

___ YES ___ NO	Did you (the student) and/or your spouse file, or will file, a 2019 IRS Tax Return?
If YES (Student and/or spouse filed 2019 IRS tax return)	If you (the student) filed, or will file, a 2019 Tax Return <ol style="list-style-type: none"> 1. Utilize the IRS Data Retrieval Tool (DRT) within your FAFSA application (QUICKEST METHOD!) <p style="text-align: center;">OR</p> <ol style="list-style-type: none"> 2. Provide a copy of your SIGNED 2019 Tax RETURN Transcript (See instruction page for additional information.)
If NO (Student and/or spouse did not file 2019 IRS tax return)	If you (the student) and/or your spouse did not, and were not required to, file a 2019 Tax Return <ol style="list-style-type: none"> 1. Complete the Statement of Non-Filing Status and 2. Provide documentation from the IRS dated on or after October 1, that indicates a 2019 income tax return was not filed (Complete and submit IRS form 4506-T) and 3. Provide copies of W-2's and/or 1099 forms from ALL employers. <i>Replacement copies of W-2's may be obtained from your employer or by requesting a Wage and Income Transcript from the IRS (www.irs.gov).</i> (See instruction page for additional information.)

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D. Sign and Date this Worksheet

Each person signing below certifies that all of the information reported is complete and correct.

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

Printed Student Name

Student Signature

Date

Printed Spouse Name

Spouse Signature

Date

E. Submit Documents to FAO

Submit ALL required documentation to FAO. (See next page for Instructions)
Please review Checklist below to make sure you are providing ALL required information:

STUDENT/SPOUSE	REQUIRED DOCUMENTATION
	If FILED 2019 Taxes
<input type="checkbox"/>	Signed Verification Worksheet
<input type="checkbox"/>	Completed DRT (recommended) or order Tax RETURN Transcript and will forward to FAO
	If DID NOT FILE 2019 Taxes
<input type="checkbox"/>	Signed Verification Worksheet
<input type="checkbox"/>	Statement of Non-Filing
<input type="checkbox"/>	Completed 4506-T and sent to IRS.
<input type="checkbox"/>	Attached all W2s/1099s from ALL employers for 2019 if I was employed but did not file

2021-22 STATEMENT OF NON-FILING STATUS

Complete this form if you, and/or your spouse did NOT and were not required to file a **2019** federal tax return (or foreign return).

Student Name: _____ Student ID: _____

Section A: Student and/or Student's Spouse Statement of Non-Filing Status

	YES	NO	Not married
Were you (the student) employed at any time during 2019?			
If Married, was your spouse employed at any time during 2019?			

If you, or your spouse, were employed in 2019 and did not file a tax return, list the income received from all employers AND attach W2, 1099 or Wage and Income Transcript from the IRS.

Name of Non Filer	Employer or Source of Income	2019 Income Amount

I/we certify that I/we did not and were not required to file a 2019 federal income tax return or foreign tax return and that all of the information reported is complete and accurate.

Student Signature

Date

Spouse Signature

Date

Alderson Broaddus University 2017-18 Verification - Dependent V1

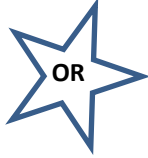
Required Verification Documentation Instruction Page

FOR THOSE WHO FILED 2019 FEDERAL INCOME TAXES

Complete IRS Data Retrieval Tool (Recommended Method)

The most efficient way to provide your IRS tax information is by using the IRS Data Retrieval Tool (DRT) within your FAFSA application.

In most cases, no further income verification documentation is required when using this tool as long as information is unchanged.



Order IRS Tax RETURN Transcript 2019

If you are unable or choose not to use DRT, you can order a Tax Return Transcript OR a Personal Signed Tax Return Will be sufficient

Once Transcript is received, you must provide copy to the FAO

HOW TO COMPLETE DRT?

Go to www.fafsa.gov and select Login.

- Select "Make FAFSA Corrections"
- Select the Financial Information tab and follow the instructions provided. Be sure to enter your address exactly as it appears on your Federal 1040.
- Once the IRS data transfer is complete, electronically SIGN and SUBMIT your FAFSA.

HOW TO ORDER TAX TRANSCRIPT?

Telephone: 800-908-9946 (opt. 2) RETURN for 2019 year taxes

Online: www.irs.gov

Make sure your request is for the **IRS TAX RETURN** Transcript and *NOT (opt. 1)* the IRS Tax Account Transcript.

There is no charge to obtain your Tax RETURN Transcript.

FOR THOSE WHO DID NOT FILE 2019 FEDERAL INCOME TAXES

Complete Statement of Non-Filing Status

Complete, sign and return Statement of Non-Filing Status

* Attach W2/1099s if you were employed during 2019, but did not file a federal tax return

Replacement copies of W-2's may be obtained from your employer or by requesting a Wage and Income Transcript from the IRS (www.irs.gov).



Complete IRS Form 4506-T

Complete, sign and submit Form 4506-T to IRS.

Form 4506-T Instructions

- Complete 1a, 1b and 3
- Sign and Date the form
- Fax or Mail to IRS (on page 2 of form)

TAX FILERS WITH SPECIAL CONDITIONS

If you were granted an extension by the IRS, filed an Amended Tax Return, were victims of Tax Administration Identity Theft or filed a non-US Income Tax Return, call the FAO for further instructions.