

2022- 2023 Verification Worksheet Independent Student

Your 2022-2023 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. As a result of your verification status, we must ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document with any other required documents. If there are discrepancies, your FAFSA information may need to be corrected. You/spouse whose information was reported on the FAFSA must complete and sign this institutional verification document, attach any required documents, and submit the form and other required documents to us. We may ask for additional information. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed. If you do not complete the verification process, you forfeit federal student aid eligibility.

| | | | |
|----------------|--|---------|--|
| Student's Name | | BCC ID# | |
| Phone Number | | SSN | |

A. Household Listing (attach separate page if necessary)

List the people you (and your spouse) will support between July 1, 2022 and June 30, 2023.

- Include yourself, your spouse, and your dependent child(ren).
- Include other people only if they now live with you and you provide more than half their support and will continue to provide more than half their support between July 1, 2022 and June 30, 2023 (see Section B).

| Full Name | DOB | Relationship | College (if applicable) for 2022-2023 (Enrolled at least half-time) |
|-----------|-----|--------------|--|
| | | Self | Berkshire Community College |
| | | | |
| | | | |
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| | | | |

B. Other Household Member(s) - Complete only if you have listed someone other than self, spouse, and/or child(ren) in the box above.

Please explain why this person resides in your household. Also list any income, benefits, and/or support this person received from an outside source during all of 2020 (e.g., SSI, SNAP, child support, etc.). If the person is under the age of 18, include their parent(s)' income, benefits, and support. You may be asked to submit documentation of this information.

C. 2020 Income Tax Status and Requirements

| Student/Spouse Information - Check One: | |
|---|---|
| <input type="checkbox"/> | I/We did not (or could not) transfer 2020 tax return data to the FAFSA using the IRS Data Retrieval Tool. <ul style="list-style-type: none"> • Attach a signed copy of your 2020 IRS Tax Return and all applicable schedules. • Attach all 2020 W-2 forms issued to you/spouse. • Attach a copy of schedule C or SE from the 2020 tax return if you/spouse is self-employed. |
| <input type="checkbox"/> | I/We used (or will now correct the FAFSA to use) the IRS Data Retrieval Tool to transfer 2020 tax return data and have not/will not alter the transferred information. <ul style="list-style-type: none"> • Attach all 2020 W-2 forms issued to you/spouse. • Attach a copy of schedule C or SE from the 2020 tax return if you/spouse is self-employed. |
| <input type="checkbox"/> | I/We did not work and will not file a 2020 U.S. Federal Income Tax Return. <ul style="list-style-type: none"> • Attach an official IRS Verification of Non-filing for you and your spouse (if applicable), which can be ordered by filing Form 4506-T. |
| <input type="checkbox"/> | I/We worked but are NOT required to file a 2020 U.S Federal Income Tax Return. <ul style="list-style-type: none"> • Attach an official IRS Verification of Non-filing for you and your spouse (in applicable), which can be ordered by filing Form 4506-T. • Attach all 2020 W-2 forms issued to you/spouse. • Attach a signed statement of income that you did not receive a W-2 for; include employer information. |

D. Asset Information – (Do not leave any items blank; if \$0, enter \$0)

| Asset Information | Student/Spouse |
|--|----------------|
| Current balance of cash, savings, and checking accounts (not student aid) | \$ |
| Net worth ¹ of your current investments ² | \$ |
| Net worth of current business and/or investment farms. Do not include a business that has less than 100 full-time employees or a farm that you live on and operate. ³ | \$ |

¹ **Net worth** means the current value, as of today, of investments, businesses, and/or investment farms, minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use 0 for investments or properties with a negative value.

² **Investments include** real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc. Investments also include qualified educational benefits or education savings accounts (e.g., Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans). For a student who does not report parental information, the accounts owned by the student (and/or the student's spouse) are reported as student investments. **Investments do not include** the home you live in, the value of life insurance, retirement plans (401(k) plans, pension funds, annuities, noneducation IRAs, Keogh plans, etc.) or cash, savings and checking accounts already reported. Investments also do not include UGMA and UTMA accounts for which you are the custodian, but not the owner. Investment value means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments.

³ **Business and/or investment farm value includes** the market value of land, buildings, machinery, equipment, inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral. Do not include the value of a small business if your family owns and controls more than 50% of the business and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, your family includes (1) persons directly related to you, such as a parent, sister, cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law. Investment farm does not include the value of a family farm that you (your spouse) live on and operate.

E. Support Questions

In 2020 or 2021, did your household receive benefits from any of the programs listed below? Mark all that apply.

| Source | Monthly Amount |
|--|----------------|
| Social Security Benefits | \$ |
| Supplemental Security Income (SSI) | \$ |
| Temporary Assistance for Needy Families (TANF) | \$ |

| | Yes | No |
|--|-----|----|
| MassHealth /Medicaid | | |
| Supplemental Nutrition Assistance (SNAP) | | |
| Free or Reduced Price School Lunch | | |
| Special Supplemental Nutrition Program for Women, Infants & Children (WIC) | | |
| Subsidized/Section 8 Housing | | |

F. Living Situation

- Are you/spouse responsible for the payment of rent/mortgage?

Yes or No, I (we) lived with: _____

If you paid this person rent, enter amount for 2020 \$ _____

- Were your/spouse's living expenses in 2020 provided by a third party (including but not limited to a rehabilitation center, homeless shelter, correctional facility, etc.)?

No or Yes, Name and Location _____

Relevant Dates _____

- Did any person pay or give you/spouse money to pay 2020 bills for living expenses that were in your/spouse name?

No or Yes, Name _____ Relationship to student _____

Amount provided in 2020 \$ _____ Dates support provided in 2020 _____

Other relevant information:

G. Income Information

Please fill in the information on these worksheets using calendar year 2020 information. **If the value for an item is \$0, write in a \$0. We cannot assume that a blank entry means \$0.**

| Calendar Year 2020 | Student/Spouse |
|---|--------------------------------|
| Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for child(ren) in your (or your parent's) household, as reported in Section A of this worksheet. Name of person who paid support: <input type="text"/> List all child(ren) for whom support was paid: <input type="text"/> List the person(s) who received the support you paid: <input type="text"/> | \$ |
| Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based portions of fellowships and assistantships. | \$ |
| Taxable grant and scholarship aid reported to the IRS included in adjusted gross income . Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarships portions of fellowships and assistantships. | \$ |
| Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not include untaxed combat pay. | \$ |
| Earnings from work under a cooperative education program offered by a college. | \$ |
| Child support received for any of your children. Do not include foster care or adoption payments. | \$ |
| Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or the value of a basic military allowance for housing. | \$ |
| Veteran's non education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. | \$ |
| Other untaxed income not reported, such as workers' compensation, disability benefits, untaxed foreign income, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1—line 25. Don't include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels. | \$ Source (s): _____ |

H. Sign This Worksheet

By signing this worksheet, we certify that all the information reported on it is complete and correct.

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

Student Signature

Date

Spouse Signature

Date

The verification process may take 4-6 weeks. If you have other family members attending BCC, we may collect these documents for their financial aid record also. We reserve the right to request documentation of any items listed on the worksheet, including, but not limited to, child support paid, receipt of SNAP Benefits (food stamps), or proof of IRA distribution and/or pension rollovers. Students who successfully matched their FAFSA to IRS data may not need to submit a Tax Return/Transcript. Tax Return/Transcripts may be required in cases of divorce/separation, and/ or separate tax filing.