

# NORTH BENNET ST. SCHOOL

## DEPENDENT STUDENT INCOME VERIFICATION WORKSHEET: 2019-2020

Your financial aid application has been selected for a process called “verification.” Through the verification process, the North Bennet Street School (NBSS) Financial Aid Office will confirm information reported by you and your parent(s) on your 2019-2020 Free Application for Federal Student Aid (FAFSA) with the information submitted on this Dependent Student Income Verification Worksheet. Please complete and return this worksheet to the NBSS Financial Aid Office as soon as possible. Your financial aid application is not complete without this form. Please contact the Financial Aid Office at 617-227-0155 if you need assistance completing this form.

### A. Student Information:

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*First Name*

*Last Name*

*Middle Initial*

### B. Student’s Income Information to Be Verified

1. TAX RETURN FILERS—**Important Note:** If the student filed, or will file, an amended 2017 IRS tax return, the student must contact the financial aid office before completing this section.

**Instructions:** Complete this section if the student filed or will file a 2017 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student has not already used this tool, go to FAFSA.gov, log in to the student’s FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student is eligible to use the IRS Data Retrieval Tool to transfer 2017 IRS income tax information into the student’s FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.*

#### Check the box that applies:

- The student has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2017 IRS income information into the student’s FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student’s school will use the IRS information that was transferred in the verification process.*
- The student has not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2017 IRS income information into the student’s FAFSA once the student has filed a 2017 IRS tax return. *See instructions above for information on how to use the IRS Data Retrieval Tool. The financial aid office cannot complete the verification process until the IRS information has been transferred into the FAFSA.*
- The student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and the student will submit to the school a **2017 IRS tax return transcript**—not a photocopy of the income tax return. *To obtain an IRS tax return transcript, go to [www.IRS.gov](http://www.IRS.gov) and click on the “Order a Return or Account Transcript” link, or call 1-800-908-9946. Make sure to request the “IRS tax return transcript” and not the “IRS tax account transcript.” You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2017 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.*
  - Check here if the student’s IRS tax return transcript is attached to this worksheet.*
  - Check here if the student’s IRS tax return transcript will be submitted to the student’s school later. Verification cannot be completed until the IRS tax return transcript has been submitted to the student’s school.*

2. TAX RETURN NONFILERS—Complete this section if the student will not file and is not required to file a 2017 income tax return with the IRS.

**In general, once you earn the following minimum gross income amounts, the law requires you to file a federal tax return with the IRS. Please check your filing status. If you made more than the amounts listed below you must file a 2017 federal tax return.**

Filing Status	Income	Filing Status	Income
Single	\$ 9,500	Married Filing Jointly	\$19,000
Head of Household	\$12,200	Married Filing Separately	\$ 3,700
Qualifying Widow (with dependent child)	\$15,300	Single Dependent (claimed on parents' federal tax return)	\$ 5,800

**Check the box that applies:**

- The student was not employed and had no income earned from work in 2017.
- The student was employed in 2017 and has listed below the names of all the student's employers, the amount earned from each employer in 2017, and whether a W-2 form is attached. Attach copies of all 2017 W-2 forms issued to the student by employers. *List every employer even if they did not issue a W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Employer's Name	2017 Income Earned	W-2 Form Attached
Ex. NBSS	Ex. \$2,000	Ex. Yes

**C. Parent(s)' Income Information to Be Verified**

1. TAX RETURN FILERS—**Important Note:** If the student's parent(s) filed or will file an amended 2016 IRS tax return the NBSS Financial Aid Office must be contacted before completing this section.

**Instructions:** Complete this section if the student's parent(s) filed or will file a 2017 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student's parent(s) have not already used the tool, the parent and the student should go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the parent(s) are eligible to use the IRS Data Retrieval Tool to transfer 2017 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.*

**Check the box that applies:**

- The student's parent(s) have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2017 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information transferred into the student's FAFSA to complete the verification process.*
- The student's parent(s) have not yet used the IRS Data Retrieval Tool, but will use the tool to transfer 2017 IRS income information into the student's FAFSA once the parent(s) IRS tax return has been filed. *See instructions above for information on how to use the IRS Data Retrieval Tool. The financial aid office cannot complete verification until the student's parent(s) have transferred IRS information into the student's FAFSA.*
- The student's parent(s) are unable or choose not to use the IRS Data Retrieval Tool, and the parent(s) will submit to the student's school a copy of the parent(s)' **2017 IRS tax return transcript(s)**—please do not send photocopies of the income tax return. *To obtain an IRS tax return transcript go to www.IRS.gov and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure you order the "IRS tax return transcript" and not the "IRS tax account transcript." The parent will need his or her Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2016 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers.*

If the parents are married and filed separate 2017 tax returns, 2017 IRS tax return transcripts must be submitted for each parent.

- Check here if an IRS tax return transcript(s) is attached to this worksheet.
- Check here if IRS tax return transcript(s) will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to the school.

2. TAX RETURN NONFILERS—Complete this section if the student's parent(s) will not file and are not required to file a 2017 income tax return with the IRS.

**In general, once you earn the following minimum gross income amounts, the law requires you to file a federal tax return with the IRS. Please check your filing status. If you made more than the amounts listed below you must file a 2017 federal tax return.**

Filing Status	Income	Filing Status	Income
Single	\$ 9,500	Married Filing Jointly	\$19,000
Head of Household	\$12,200	Married Filing Separately	\$ 3,700
Qualifying Widow (with dependent child)	\$15,300	Single Dependent (claimed on parents' federal tax return)	\$ 5,800

**Check the box that applies:**

- The parent(s) were not employed and had no income earned from work in 2017.
- The parent(s) were employed in 2017 and have listed below the names of all the parent(s)' employers, the amount earned from each employer in 2017, and whether a W-2 form is attached. Attach copies of all 2017 W-2 forms issued to the parent(s) by employer(s). List every employer even if they did not issue a W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.

**PARENT NAME:** \_\_\_\_\_

Employer's Name	2017 Income Earned	W-2 Form Attached
Ex. NBSS	Ex. \$2,000	Ex. Yes

**PARENT 2 NAME:** \_\_\_\_\_

*(if applicable, i.e. parents are married, includes step-parent)*

Employer's Name	2017 Income Earned	W-2 Form Attached
Ex. NBSS	Ex. \$2,000	Ex. Yes

**D. Certification:**

\_\_\_\_\_  
Student signature Date Parent signature\* Date

*\*At least one parent signature is required for dependent students.*

**Return this form** to the NBSS Financial Aid Office as soon as possible at: 150 North St., Boston, MA 02109, or by fax to 617-227-9292. Please contact the financial aid office at 617-227-0155 ext. 115 if you have any questions about the Income Verification Worksheet for dependent students.