

NORTH BENNET ST. SCHOOL

INDEPENDENT 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 spouse (if applicable) on your 2019-2020 Free Application for Federal Student Aid (FAFSA) with the information submitted on this Independent 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:

<i>First Name</i>	<i>Last Name</i>	<i>Middle Initial</i>
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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 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 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 IRS tax return filers. If the student is married, and separate 2016 tax returns were filed, 2017 IRS tax return transcripts must be submitted for both the student and the student’s spouse.*
 - Check here if the student’s (and spouse’s if applicable) IRS tax return transcript is attached to this worksheet.*
 - Check here if the student’s (and spouse’s if applicable) IRS tax return transcript will be submitted to the student’s school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to NBSS.*

2. TAX RETURN NONFILERS—Complete this section if the student (and spouse if applicable) will not file and is not required to file a 2016 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 (and spouse if applicable) was not employed and had no income earned from work in 2017.
- The student (and/or spouse if applicable) was employed in 2017 and has listed below the names of all 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 (and spouse if applicable) 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.*

Student employment

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

Student spouse employment (if applicable)

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

D. Certification:

_____ Date _____ Date
Student signature Spouse signature (if applicable)

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 Independent Student Income Verification Worksheet.