

## Independent Verification Worksheet Instructions

The U.S. Department of Education requires schools to verify the data reported on the Free Application for Federal Students Aid (FAFSA) for a percentage of students who have completed the FAFSA. Your file has been selected for verification: please follow the steps as outlined below.

1. Please complete the Independent Verification Worksheet. Remember to answer every question on the form; in addition the form must be SIGNED by the student.
2. Both you and your spouse must provide official 2016 federal tax information. If you and/or your spouse are not required to file a federal tax return per the IRS regulations, you will need to indicate this in Section C, Question 2, on the Independent Verification Worksheet and submit W-2 and 1099-Misc. forms.
3. If you and/or your spouse are required to file a federal tax return, you have two options (A and B listed below) in which to submit income information. Please note, this is a change from prior years; schools can no longer accept copies of tax forms directly from students, except in very rare cases. Please make sure to indicate in Section C.
4. Question 1, on the Independent Verification Worksheet the method in which you have chosen to submit this information.
  - A. If you and/or your spouse are required to file a 2016 federal tax return and did not use the IRS Data Retrieval Process, you must request a 2016 Tax Return Transcript from the IRS. **PLEASE NOTE THIS METHOD WILL DELAY PROCESSING OF YOUR FILES AS IT MAY TAKE UP TO TWO WEEKS FOR THE IRS TO PROCESS YOUR REQUEST.**

There are three methods to request a Tax Return Transcript:

    - Via the IRS website at [www.irs.gov](http://www.irs.gov), you can request one on-line;
    - By calling 1-800-908-9946; or
    - Complete and submit FORM 4506-T to the IRS.
5. Important: Along with the tax return transcript(s), you will also need to submit copies of all 2016 W-2 and 1099-Misc. forms for those individuals submitting a tax return transcript.
6. Please submit in a timely fashion all documents at the same time to address listed on the Independent Verification Worksheet. Please make sure to include your Student ID# on all documents submitted.
7. Please review the instructions to make sure you have completed all the required forms. Failure to submit all the documents as per the instructions will delay processing your file.

### QUESTIONS? CONTACT US.

WESTERN SEMINARY  
ATTN: FINANCIAL AID OFFICE  
5511 SE Hawthorne Blvd  
Portland, OR 97215-3367  
(503) 517-1801 fax  
or via email at  
[finaid@westernseminary.edu](mailto:finaid@westernseminary.edu)

## PERSONAL INFORMATION

Mr. Miss Ms. Mrs. Rev. Dr. Male Female

Full Name \_\_\_\_\_ Student ID \_\_\_\_\_  
 First Middle Last

Address \_\_\_\_\_ City \_\_\_\_\_

DOB \_\_\_\_\_ Email \_\_\_\_\_ Cell Phone \_\_\_\_\_

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

## SECTION A – FAMILY INFORMATION

List the people in your household. Indicate those who will be attending college at least half time between July 1, 2018 and June 30, 2019, and will be enrolled in a degree, diploma, or certificate program.

If you are an independent student, include:

- Yourself and your spouse (if applicable).
- Your children, if you will provide more than half of their support from July 1, 2018 through June 30, 2019, even if they do not live with you.
- Other people 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 from July 1, 2018 through June 30, 2019.

Full Name	Age	Relationship	Attending College in 2018-19 (at least half time)		Name of College Attending & Degree Program
		self	yes	no	Western Seminary
			yes	no	
			yes	no	
			yes	no	
			yes	no	
			yes	no	

## SECTION B – 2016 TAX FILING STATUS

Student (and Spouse, if applicable) – Check the appropriate box.

**I have filed my 2016 Federal Tax Return** – Please return to the 2018-19 FAFSA and complete the IRS Retrieval process.

I have used the IRS Retrieval process, leaving your imported tax information unchanged. If you are unable to complete the IRS Data Retrieval process, please contact the Office of Financial Aid for further instructions.

**I have filed a tax extension for my 2016 Federal Tax Return** – Attach a copy of Form 4868 Tax Extension, W2s, and an AGI Estimator Worksheet (contact the Office of Financial Aid for further instructions).

**I have not filed and am not required to file a 2016 Federal Tax Return** – Attach copies of all 2016 W2s.

## SECTION C – 2016 INCOME DOCUMENTATION

List income from Box 1 of all W2s, Schedules C & F, Box 14 Code A of Schedule K-1, and income from other sources. Student (and Spouse, if applicable)

Source of Income (Wages, Business, Farm, Other)	Earned in 2016	Earned By Student or Spouse
	\$	
	\$	
	\$	

## SECTION D – 2016 UNTAXED INCOME

<b>Do not leave any space blank.</b>	<b>Student</b>	<b>Spouse</b>
Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. Don't include amounts reported in code DD (employer contributions toward employee health benefits).	\$	\$
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040—line 28 + line 32 or 1040A—line 17.	\$	\$
Child support received for any of your children. <b>Don't include</b> foster care or adoption payments.	\$	\$
Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.	\$	\$
Untaxed portions of IRA distributions from IRS Form 1040—lines (15a minus 15b) or 1040A—lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here.	\$	\$
Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	\$	\$
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). <b>Don't include</b> the value of on-base military housing or the value of a basic military allowance for housing.	\$	\$
Veteran's noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$	\$
Other untaxed income not reported in items 45a through 45h, such as workers' compensation, disability benefits, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040—line 25. <b>Don't include</b> 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.	\$	\$
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement	\$	\$

## SECTION E – 2016 ADDITIONAL FINANCIAL INCOME

Do not leave any space blank.	Student	Spouse
Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040—line 50 or 1040A—line 33.	\$	\$
Child support paid because of divorce or separation or as a result of a legal requirement. <b>Don't include</b> support for children in your household.	\$	\$
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$	\$
Taxable college grant and scholarship aid <b>reported to the IRS in your adjusted gross income</b> . Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship 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. <b>Don't include</b> untaxed combat pay.	\$	\$
Earnings from work under a cooperative education program offered by a college.	\$	\$

## SECTION F – FOOD STAMP VERIFICATION

Did you or anyone in your household receive food stamps (SNAP) in the 2016 or 2017 calendar years? Yes No

## SECTION G – ASSET VERIFICATION

Do not leave any space blank.	Student	Spouse
As of the date you signed the FAFSA, what was the total balance in cash, savings, and checking accounts?	\$	\$
As of today, what is the net worth of your (and spouse's) investments, including real estate? Don't include the home you live in. Net worth means current value minus debt	\$	\$
<i>Investments include real estate, trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, 529 college savings plans, the refund value of 529 prepaid tuition plans*, installment and land sale contracts (including mortgages held), commodities, etc. 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. Do not include the value of your primary residence.</i>		
<i>Investments do not include the home you live in, the value of life insurance, retirement plans (401k plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.).</i>		
As of the date you signed the FAFSA, what was the net worth of your business and/or investment farms?	\$	\$
<i>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 business with 100 or fewer employees and/or a farm that you live on.</i>		

## BY SIGNING THIS WORKSHEET, I CERTIFY THAT:

- All the information reported is complete and accurate at this time.
- I have answered every question on this worksheet, even if the answer is "0" or "NA".
- I have updated (or agree to update, when available) my 2018-19 FAFSA with 2016 finalized tax data.

Signature \_\_\_\_\_ Date \_\_\_\_\_