

Student Information

Last Name: _____ First Name: _____ Middle I: _____ Person Number: _____

Your 2017-2018 FAFSA was selected for verification review. The University at Buffalo Financial Aid Office will verify your financial aid eligibility by comparing the information on your FAFSA to the information provided on this worksheet and other documents provided. If necessary, your FAFSA will be corrected. Your eligibility for federal financial aid cannot be determined until the verification review has been completed.

This worksheet should be completed in its entirety by you and your parent who signed your FAFSA before the deadline date published at financialaid.buffalo.edu/process/verification.php. If necessary, additional items may be added to your HUB To Do List during the review. Requests for additional items and verification results will be sent to your UB email address.

Section 1: STUDENT Information to Be Verified

Select the statement(s) that best represent your 2015 tax filing status and source of income. Complete the instructions as directed.

1. I filed a 2015 Federal Income Tax Return. Check the statement that applies to you and submit requested documentation:

A. I used the IRS Data Retrieval Tool when completing the FAFSA and I did not change my income information prior to the submission of the application or correction.

B. I DID NOT use the IRS Data Retrieval Tool when completing the FAFSA.

1. Attach a signed copy of your 2015 Tax Return or your 2015 IRS Tax Return Transcript(s) to this worksheet. Visit irs.gov and click on "Get a Tax Transcript" to obtain your IRS Tax Transcripts online.

Please note: Tax Account Transcript or Record of Account Transcript cannot be accepted and will be returned to you.

C. I filed a foreign tax return.

1. Attach a copy of your Foreign Tax Transcript with a copy of English translation. If you are unable to obtain a free copy of your transcript, a signed copy of your Tax Return may be provided along with documentation that the foreign tax authority charges a fee to obtain the transcript.

2. I DID NOT file a U.S. or Foreign 2015 Federal Income Tax Return and I was not required to file. (Check the guidelines on page 4 to see if you are required to file taxes).

A. List the employer(s) and any income received in 2015. Attach an additional sheet if extra space is required. Attach copies of all W2 statements. Please leave the Student Employer section below "blank" if you did not earn income from work in 2015.

| Student's Employer(s) Name | 2015 Amount Earned | IRS W-2 Attached |
|--|--------------------|---|
| <i>(Example) Suzy's Auto Body Shop</i> | <i>\$2,000.00</i> | <input checked="" type="checkbox"/> Yes |
| | | <input type="checkbox"/> Yes |
| | | <input type="checkbox"/> Yes |
| | | <input type="checkbox"/> Yes |

B. If you selected Not Applicable in the table above please attach a signed statement explaining how you were supported in 2015.

Person Number: _____

Section 2: SPOUSE Income Information to Be Verified

- Check this box if you were single on the date you submitted your FAFSA, or if you are married and filed a joint 2015 Federal Tax Return. Continue to Section 3 of this worksheet.

If you did not check the box above, your spouse must complete the remainder of Section 2 below.

Select the statement(s) that best represent your 2015 tax filing status and source of income. Complete the instructions as directed.

- 1. I filed a 2015 Federal Income Tax Return.** Check the statement that applies to you and submit requested documentation:
- A.** I used the IRS Data Retrieval Tool when completing the FAFSA and I did not change my income information prior to the submission of the application or correction.
 - B.** DID NOT use the IRS Data Retrieval Tool when completing the FAFSA.
 1. Attach a signed copy of your 2015 Tax Return or your 2015 IRS Tax Return Transcript(s) to this worksheet. Visit irs.gov and click on "Get a Tax Transcript" to obtain your IRS Tax Transcripts online.

Please note: Tax Account Transcript or Record of Account Transcript cannot be accepted and will be returned to you.
 - C.** I filed a foreign tax return.
 1. Attach a copy of your Foreign Tax Transcript with a copy of English translation. If you are unable to obtain a free copy of your transcript, a signed copy of your Tax Return may be provided along with documentation that the foreign tax authority charges a fee to obtain the transcript.
- 2. I DID NOT file a U.S. or Foreign 2015 Federal Income Tax Return and I was not required to file. (Check the guidelines on page 4 to see if you are required to file taxes).**

- A.** List the employer(s) and any income received in 2015. Attach an additional sheet if extra space is required. Attach copies of all W2 statements. Please leave the Spouse Employer Section below "blank" if you did not earn income from work in 2015.

| Spouse's Employer(s) Name | 2015 Amount Earned | IRS W-2 Attached |
|--|--------------------|---|
| <i>(Example) Suzy's Auto Body Shop</i> | <i>\$2,000.00</i> | <input checked="" type="checkbox"/> Yes |
| | | <input type="checkbox"/> Yes |
| | | <input type="checkbox"/> Yes |
| | | <input type="checkbox"/> Yes |

- B.** If you did not earn income from work please attach a signed statement explaining how you supported your household in 2015.

Person Number: _____

Section 3: Household Verification

List ALL individuals in your household, including:

1. Yourself and your spouse (if married); and
2. Your other children if you provide more than half of their support from July 1, 2017 through June 30, 2018; and
3. Other people that live with you if you currently provide more than half of their support and will continue to provide more than half of their support from July 1, 2017 and June 30, 2018.

Write the names of all household members in the space(s) below along with the name of the college for any household member who will be enrolled at least half-time between July 1, 2017 and June 30, 2018 in a degree, diploma, or certificate program at a Title IV eligible institution. Do not include parents' colleges (parents cannot be counted in the number in college total). If you need more space, attach a separate sheet.

| Full Name | Age | Relationship | University/College* |
|-----------------------|-----|--------------|--------------------------------|
| Missy Jones (example) | 48 | Mother | N/A (cannot include parent(s)) |
| | | Self | University at Buffalo |
| | | | |
| | | | |
| | | | |
| | | | |

*If you have indicated more than one in college, enrollment verification may be required.

Section 4: Income Exclusions & Untaxed Income

Complete each line by either entering the dollar amount received or checking the Not Applicable box to indicate that the item listed does not apply to you.

| Income Exclusion | Student (Check the box if Not Applicable) | Spouse (Check the box if Not Applicable) |
|--|---|--|
| Rollover amount included in IRA distribution | \$ N/A <input type="checkbox"/> | \$ N/A <input type="checkbox"/> |
| Untaxed Income | Student (Check the box if Not Applicable) | Spouse (Check the box if Not Applicable) |
| IRA, Deductions and payments to: self-employed SEP, SIMPLE, KEOGH and other qualified plan | \$ N/A <input type="checkbox"/> | \$ N/A <input type="checkbox"/> |
| Tax Exempt Interest | \$ N/A <input type="checkbox"/> | \$ N/A <input type="checkbox"/> |
| Untaxed Portions of IRA Distributions | \$ N/A <input type="checkbox"/> | \$ N/A <input type="checkbox"/> |
| Untaxed Portions of Pensions | \$ N/A <input type="checkbox"/> | \$ N/A <input type="checkbox"/> |

Section 5: Certification and Signature

I certify that all information provided in this document is true, complete and accurate to the best of my knowledge. I further understand that any false statement or misrepresentation will be cause for denial, reduction, withdrawal, and/or repayment of financial aid. Also, purposely giving false or misleading information on this worksheet may lead to fines, jail sentences, or both. I authorize the University at Buffalo to make any change(s) necessary as a result of the updated information that I have provided.

Student Signature

Date

Spouse Signature (if married)

Date

Minimum Income Requirements to File a 2015 Tax Return

Federal regulations require 2015 taxes to be filed based on the following income guidelines:

| Filing Status | Age | Minimum W-2 Income Requirement | Minimum Self-Employment Income Requirement |
|---|----------------------------|--------------------------------|--|
| If you are single and can be claimed on another taxpayer's return | Under 65 | \$6,300 | \$400 |
| Single | Under 65 | \$10,300 | \$400 |
| | 65 or older | \$11,850 | \$400 |
| Head of Household | Under 65 | \$13,250 | \$400 |
| | 65 or older | \$14,800 | \$400 |
| Married Filing Jointly | Under 65 (both spouses) | \$20,600 | \$400 |
| | 65 or older (one spouse) | \$21,850 | \$400 |
| | 65 or older (both spouses) | \$23,100 | \$400 |
| Married Filing Separately | Any age | \$4,000 | \$400 |
| Qualifying Widow(er) with Dependent Children | Under 65 | \$16,600 | \$400 |
| | 65 or older | \$17,850 | \$400 |

Regardless of your gross income, you are generally required to file an income tax return if any of the following are true:

- You had net self-employment income of \$400 or more
- You had unemployment income
- You owe Alternative Minimum Tax
- You owe household employment taxes
- You owe additional taxes on a retirement plan (an individual retirement arrangement (IRA) or other tax-favored account) or health savings account
- You must repay the 2008 Homebuyer Credit (or any other recapture taxes)
- You owe Social Security and Medicare taxes on unreported tip income
- You earned \$108.28 or more from a tax-exempt church or church-controlled organization
- You received distributions from an MSA or Health Savings Account
- You received an advance payment on the Premium Tax Credit.