

# LAMAR INSTITUTE OF TECHNOLOGY FINANCIAL AID

## 2018-2019      V5 Independent      Aggregate Worksheet

**PURPOSE:**

Your Free Application for Federal Student Aid (FAFSA) was selected for review in a process called **VERIFICATION**. The law says that we may ask you to confirm the information you and/or your spouse reported on your FAFSA. To verify that you provided correct information, the financial aid office at your school will compare your FAFSA to information on this worksheet and any required documents. If **CORRECTIONS** should be necessary, your **FINANCIAL AID OFFICE** will submit them via the Federal F.A.A. authorized site.

**DO NOT MAKE CHANGES TO YOUR FAFSA ONCE THE VERIFICATION PROCESS HAS BEGUN AT YOUR SCHOOL.**

**INSTRUCTIONS:**

You and/or your spouse must complete and sign this worksheet, attach **ALL REQUIRED DOCUMENTS**, and submit the **COMPLETED PACKET** to the financial aid office. Your financial aid office may be required to ask for additional information based on data provided in your initial packet. Please comply timely if this becomes necessary. If you have questions about verification, contact your financial aid office as soon as possible so that your financial aid will not be delayed.

Office Use Only
<b>V5IND</b>

LIT ID: T- \_\_\_\_\_

Student Name: \_\_\_\_\_

Date of Birth: \_\_\_\_ - \_\_\_\_ - \_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Student Phone: \_\_\_\_\_ Spouse Phone: \_\_\_\_\_ Alternate Phone: \_\_\_\_\_

### Section A: Family Information

List below the people in the student's household. You must include:

- Yourself, as the student applicant.
- Your spouse **if you are/were legally married** at the time the FAFSA was completed.
- You and/or spouse's children **IF** you/spouse will provide more than ½ their support from July 1, 2018-June 30, 2019.
  - Even if the children do not live in your household.
  - **DO NOT** include children that would qualify as **INDEPENDENT** students if they completed a FAFSA.
- Other people if they **now** live with you, and you/spouse **provide more than half** of their support and will continue to do so through June 30, 2019.

**Also:** For any household member listed below who will be enrolled at least half time in a degree, diploma, or certificate program at an eligible post-secondary educational institution any time between July 1, 2018 and June 30, 2019, please provide the College Name and a copy of their college schedule.

Full Name of Qualified Family Member	Age	Relationship To Student	College to be attended by family member	Enrolling ½ time or more	Schedule Attached
<i>Missy Jones (example)</i>	<i>18</i>	<i>Sister</i>	<i>Central University</i>	<i>Yes</i>	<i>Yes</i>
		<b>Self</b>			<b>n/a</b>

**Important Notice:** If you purposely give false or misleading information, you may be fined \$20,000, sent to prison, or both. Work with your Financial Aid Office to complete the Verification process timely and accurately. This will help you prevent delays, and avoid loss of eligibility or future penalties.

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**Section B: Student/Spouse Income Information**

The best way to populate the income sections of your FAFSA and to complete the verification of income information is to have used the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov. In most cases, no further documentation will be needed to verify 2016 IRS income tax return information if all data completely and correctly transferred into the student's FAFSA and IF that information has not been changed.

**Student Tax Filers:**

Complete this section if the student/spouse has filed a 2016 IRS income tax return(s).

**Check the box that applies:**

- The student/spouse **has used the IRS DRT** to transfer 2016 tax information to the 2018-2019 FAFSA.
- The student/spouse is **unable or chooses not to** use the IRS DRT to populate FAFSA on the Web

Attach the following:

- 2016 IRS Tax Return Transcript** for yourself and/or your spouse if legally married
- 2016 W-2(s) or Wage & Income Transcript** for yourself and/or your spouse if legally married
- Statement of total 2016 earnings** from EACH employer not issuing W-2 forms

\*\*\*\*\* Please note: Per federal regulations, a photocopy of your 1040 tax form is NOT acceptable documentation \*\*\*\*\*

**Student Non-Filers:**

- The student and/or spouse was not employed and had **ZERO INCOME** earned from work in 2016.
- The student and/or spouse **WAS EMPLOYED** and received taxed or untaxed income earned from work in 2016.

**Complete the following table listing all employers, total earnings and W-2 status**

Attach the following:

- 2016 IRS Tax Return Transcript or "Statement of Non-filing"**
- 2016 W-2(s) or IRS Wage & Income Transcript**
- Statement of total 2016 earnings** from EACH employer not issuing W-2 forms

Employer's Name	2016 Earnings	W-2 Issued	Attached
<i>Suzy's Auto Body Shop (example)</i>	\$\$\$\$\$.\$\$	Yes	✓

- Incomplete Verification Data will not be accepted** by the school. Verification cannot be completed until the required IRS documents and any additional necessary paperwork has been submitted to the school.

**Important Notice:** If we have reason to believe that the information regarding income data from the 2016 base-year is inaccurate, or if you have reported an unusually low income for your household size, we may require additional documentation. You may be required to submit IRS Tax Return Transcripts and Wage & Income Transcripts even though you utilized the IRS DRT to populate your FAFSA.

How to order 2016 Tax Return Transcripts (not ACCOUNT transcript) and Wage & Income Transcripts

- |  |  |   |
|--|--|---|
| Online at <a href="http://www.irs.gov">www.irs.gov</a> | → Click "Get Transcript of Your Tax Records" | → Click "Get Transcript ONLINE"         |
|  | → Provide data to set up an account with IRS | → Click "Higher Ed / Student Aid"       |
|  | → Select "Return Transcript" for 2016        | → Repeat for "Wage & Income Transcript" |
| -----  |  |   |
| Call IRS at  | → Request "2016 Tax Return Transcript"       |   |
| 1-800-908-9946   |  |   |
| -----  |  |   |
| Mail/FAX Form 4506T-EZ                                 | → Available on the IRS website.              | → Download / Print / Complete /Submit   |
|  | → Request "Tax Return Transcript"            | → Request "Wage & Income Transcript"    |

**Each person signing this worksheet certifies that all of the information reported on it is complete and correct, and that any/all documentation required for consideration will be provided to assist the LIT Financial Aid Office with determination of eligibility. The student and/or spouse must sign and date.**

Student's Signature	Date
Spouse's Signature	Date

**Submit this worksheet with COPIES of all required documentation to the LIT Financial Aid Office. Retain copies of this worksheet and all original documentation for your records.**

**Section C: Verification of High School Completion Status**

You must provide **one of the following** documents that indicate the student's high school completion status at the beginning of the 2018-2019 year:

- A copy of the student's high school diploma.
- A copy of the student's final official high school transcript that shows the date diploma was awarded.
- A copy of the student's General Educational Development (GED) certificate or GED transcript.
- An academic transcript that indicates successful completion of at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- If state law requires a "secondary school completion" credential for homeschools, a copy of that credential.
- A transcript/equivalent, signed by the student's parent/guardian that lists the secondary school courses completed and documents successful completion of a secondary school education in a homeschool setting.

\*\*\*\*\*DO NOT COMPLETE THIS SECTION UNTIL YOU ARE AT THE FINANCIAL AID OFFICE\*\*\*\*\*

**Section D: Verification of Identity & Statement of Educational Purpose**

**Identity and Statement of Educational Purpose  
(To Be Signed AT THE INSTITUTION)**

The student must appear in person at \_\_\_\_\_ **Lamar Institute of Technology** \_\_\_\_\_ to verify his or her  
(Name of Postsecondary Educational Institution)

identity by presenting an unexpired valid government-issued photo identification (ID), such as but not limited to a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

In addition, the student must sign, **in the presence of the institutional official**, the Statement of Educational Purpose provided below.

**Identity and Statement of Educational Purpose  
(To Be Signed in the Presence of a Notary)**

If the student is unable to appear in person at \_\_\_\_\_ **Lamar Institute of Technology** \_\_\_\_\_ to verify  
(Name of Postsecondary Educational Institution)  
his or her identity, the student must provide to the institution:

- (a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport, and
- (b) The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

**Statement of Educational Purpose**

I certify that I, \_\_\_\_\_, am the individual signing this Statement of  
(Print Student's Name)  
Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending \_\_\_\_\_ **Lamar Institute of Technology** \_\_\_\_\_ for  
(Name of Postsecondary Educational Institution)  
2018-2019.

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's ID Number)