

V5: Dependent Verification Worksheet 2025-2026

STUDENT INFORMATION

Student Name	MBU ID
Address	City State Zip Code
Student's Primary Phone #	Student's Primary Email Address
Parent's Primary Phone #	Parent's Marital Status
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SECTION 1: FAMILY SIZE

Instructions: Complete the below chart for your family size according to the FAFSA definition.

Family Size includes the following:

- Yourself (the student)
- Your parents, even if you are not living with them.
 - Exclude a parent who has died or is not living in the household because of separation or divorce.
 - \circ Include a parent who is on active duty in the U.S. Armed Forces apart from the family.
- Your siblings, if <u>all</u> the following are true:
 - o They live with your parents (or live apart because of college enrollment),
 - o They receive more than half of their support from your parents, AND
 - They will continue to receive more than half their support from your parents from July 1, 2025 through June 30, 2026
- Other persons if <u>all</u> the following are true:
 - They live with your parents,
 - o They receive more than half of their support from your parents, AND
 - They will continue to receive more than half their support from your parents from July 1, 2025 through June 30, 2026

Note: The provided criteria for "dependent children" or "other persons" align with the requirement that family size align with whom the parent could claim as a dependent on a U.S. tax return if the parent were to file a U.S. tax return at the time of completing the 2025-2026 FAFSA. As a result, parents should not include any unborn children in the family size.

If more space is needed, please provide a separate page with your name and student ID at the top.

Full Name	Age	Relationship
		SELF

Student Name	MBU ID
SEC	CTION 2: VERIFICATION OF 2023 INCOME INFORMATION FOR PARENT TAX FILERS
Important Note: T	The instructions below apply to each parent included in the family size on the FAFSA. Notify the financial aid office d a change in marital status after December 31, 2023.
Instructions: Com	nplete this section if the parents filed or will file a 2022 IRS income tax return(s). Check all that apply:
 In most c 	d to transfer the 2023 IRS income tax information and it was successfully transferred into the FAFSA. cases, no further documentation is needed to verify 2023 income information that was transferred into the s FAFSA using income and tax information directly from the IRS.
• If the 202 Aid Offic If the par A 2023 IR	d to transfer the 2023 IRS income tax information and it was not transferred into the FAFSA. 23 income tax return information for the parent was not available or could not be used, provide the MBU Financial see with a 2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules rents filed "married filing separately", both parents' tax return transcripts for 2023 will need to be sent to us. 85 Tax Return Transcript may be obtained through: Get Transcript Online Go to www.irs.gov Click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a textenabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication. Get Transcript by Mail Go to www.irs.gov Click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and NOT the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request. Automated Telephone Request Call 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request. Paper Request Form RS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

☐ I/We filed an amended IRS Income Tax Return for 2023.

- Provide a signed copy of the 2023 IRS Form 1040X "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:
 - Updated income and tax information from the IRS on an ISIR record with all tax information from the original return:
 - A 2023 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all the income and tax information required to be verified; OR
 - \circ A signed copy of the 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Student Name	MBU ID
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SECTION 3: VERIFICATION OF 2023 INCOME INFORMATION FOR STUDENT TAX FILERS

Instructions: Complete this section if the student filed or will file a 2023 IRS income tax return(s). Check all that

apply: | I consented to transfer the 2023 IRS income tax information and it was successfully transferred into the

• In most cases, no further documentation is needed to verify 2023 income information that was transferred into the FAFSA. student's FAFSA using income and tax information directly from the IRS.

☐ I consented to transfer the 2023 IRS income tax information and it was not transferred into the FAFSA.

- If the 2023 income tax return information for student was not available or could not be used, provide the MBU Financial Aid Office with a 2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules. A 2023 IRS Tax Return Transcript may be obtained through:
 - Get Transcript Online
 - Go to www.irs.gov
 - Click "Get Your Tax Record."
 - Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript."
 - To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
 - Get Transcript by Mail
 - Go to www.irs.gov
 - Click "Get Your Tax Record."
 - Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and NOT the "Account Transcript."
 - The transcript is generally received within 10 business days from the IRS's receipt of the online request.
 - Automated Telephone Request
 - Call 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
 - Paper Request Form
 - IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

☐ I filed an amended IRS Income Tax Return for 2023.

- Provide a signed copy of the 2023 IRS Form 1040X "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:
 - Updated income and tax information from the IRS on an ISIR record with all tax information from the original return;
 - A 2023 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified: OR
 - A signed copy of the 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS.

tudent Name		MDO	ID	
	SECTION 4: VERIFICATIO	N OF 2023 INCOME FOR NON-	ΓΑΧ FILER	<u>S</u>
tructions: Complete turn with the IRS. The ps below.	this section ONLY if parents and term "parents" refers to the pa	d/or student will not, <u>and were not rarent</u> or parents included in the family	equired to, size of the	file a 2023 income tax FAFSA. Follow each of
Neither parent was en One or both parents w ployer in 2023, and w	hether an IRS W-2 form was pro		employer o	lid not issue an IRS W-2
	Employer's Name	Name of Parent Employed	IRS W-2 Equival Docum Provide Employ	ent Annual ent Amount ent Earned in
				\$
				\$
				\$
				\$
		Total Amount of Income Ea	rned from \	Work \$
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Student Name		MBU ID
	Instructions: Complete Section A OR Se	ection B.
Section A: CAN YOU APPEAR I	N PERSON AT MARY BALDWIN UNIVERSITY?	YES - Complete only Section A <u>in person</u> at MBU
	the Mary Baldwin University Office of Financial Aid to ven (ID), such as (but not limited to) a driver's license, oth	
n addition, the student must sign, <u>in</u>	the presence of the institutional official, the Statemen	nt of Educational Purpose provided below.
Statemen	t of Educational Purpose	Office of Financial Aid Use Only
I certify that I,(Print Stud	ent's Name) , am the individual	Valid Government-issued Photo Identification presented:
	l Purpose and that the Federal student financial used for educational purposes and to pay the cost of or 2024-2025.	Date Received:
(Student Signature)	(Date)	Received By:
the student is unable to appear in p a) A copy of the unexpired vali not limited to, a driver's lice		identity, the student must provide to the institution: snowledged in the notary statement below, such as, but ence of a notary. The form must be notarized. We
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My commission expires on _

(Date)

WITNESS my hand and official seal

(Notary signature)

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