



WESTMONT

2023-2024 Dependent Student Verification Worksheet

Students who are selected for verification must *either* a **signed copy** of their **2021 Federal Income Tax Return** or an **IRS Tax Return Transcript**. Parents who did not file a tax return for 2021 must submit a **Verification of Non-filing Letter**. The Verification of Non-Filing can be ordered online at www.irs.gov/Individuals/Get-Transcript.

STUDENT INFORMATION

Last Name	First Name	M.I.	Westmont ID Number or Last 4 digits of Social Security Number
Address			Birthdate
City	State	Zip Code	Student's Permanent Telephone
E-mail Address			Student's Cell Phone

FAMILY INFORMATION

List everyone in your *parent(s)' household*, including:

- **yourself** and
- **your custodial parent(s)** (including stepparent), and
- **other children in your parent's household** if:
 - your parent(s) will provide more than half of their support from July 1, 2023 through June 30, 2024, **or**
 - the children would be required to provide parental information when applying for federal student aid, and
- **other people only** if they now live with your parents **and** your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2023 through June 30, 2024.

Full Name	Age As of Dec. 31, 2023	Relationship to this student	For each family member who will be enrolled in a degree program <u>during the 2023-2024 academic year</u> , write the name of the college he/she will be attending
1.		<i>Self</i>	<i>Westmont College</i>
2.			
3.			
4.			
5.			
6.			
7.			

STUDENT EARNINGS FOR 2021

Did you work during 2021?

- No – Continue to Student Tax Information section
- Yes – List all sources of income amounts received in 2021. Please also include a copy of all W-2 forms for 2021.

EMPLOYERS/SOURCES OF INCOME FOR 2021	TOTAL AMOUNT OF INCOME RECEIVED IN 2021

STUDENT TAX INFORMATION

- Check here if you did not file and were not required to file a 2021 Federal Income Tax Return.
- Check here if you are providing or will provide *either* a signed copy of your 2021 Federal Income Tax Return or your IRS Tax Return Transcript.
- Check here if you used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2021 IRS Income Tax Return information into the student's FAFSA.

PARENT TAX INFORMATION

- Check here if you are providing or will provide *either* a signed copy of your parents' 2021 Federal Income Tax Return or IRS Tax Return Transcript.
- Check here if you are providing or will provide the required **Verification of Non-filing Letter** because your parent(s) did not file and were not required to file a 2021 Federal Income Tax Return.

A **Verification of Non-filing Letter** is required to show that a parent did not file taxes in 2021. The letter can be printed or saved to your computer directly from the IRS website. Go to <http://www.irs.gov/Individuals/Get-Transcript> to set up an account and obtain your Non-filing Letter. If you are unable to set up an account online, you may print out, complete and fax or mail the **IRS Form 4506-T Request for Transcript of Tax Return**, found at <https://www.irs.gov/pub/irs-pdf/f4506f.pdf>, to receive it by mail (check box 7 to request Verification of Non-filing).

If your parent(s) did not file a tax return but had income from any source in 2021, please list the sources and amounts below. Please also include a copy of their employer-generated W-2(s) for 2021.

EMPLOYERS/SOURCES OF INCOME FOR 2021	TOTAL AMOUNT OF INCOME RECEIVED IN 2021

- Check here if you used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2021 IRS Income Tax Return information into the student's FAFSA.

**Please be sure to provide an amount for each item on this page, entering \$0 where appropriate.
Incomplete forms will be returned to you.**

ASSET INFORMATION

Report the value of the items below as of the date you filed the FAFSA	Student	Parent(s)
Cash, savings and checking accounts (as of the date you filed the FAFSA). Provide exact figures only; do not round.	\$	\$
Net worth of your investments, including real estate (as of the date you filed the FAFSA) Do not include your primary residence or the value of bona fide retirement accounts. Provide exact figures only; do not round.	\$	\$
Net worth of your current business and/or investment farms (as of the date you filed the FAFSA). Do not include a farm that you live on and operate. Do not include a business that you own and control (more than 50% ownership) and has fewer than 100 employees.	\$	\$

ADDITIONAL FINANCIAL INFORMATION

Report annual amounts from 2021	Student	Parent(s)
Taxable financial aid, including earnings from need-based employment programs, such as Federal Work-Study, as well as any taxable grants and scholarships included in your adjusted gross income.	\$	\$
Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay.	\$	\$

UNTAXED INCOME

Report annual amounts from 2021	Student	Parent(s)
Payments to tax-deferred pension and savings plans	\$	\$
Child support <u>received</u> (Do not include foster care or adoption payments)	\$	\$
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value benefits). Do not include the value of on-base military housing or the value of basic military allowance for housing.	\$	\$
Worker's Compensation and/or Disability	\$	\$
Veterans Noneducation Benefits	\$	\$
Money received or paid on the student's behalf (not including support from custodial parents)	\$	\$
Other untaxed income	\$	\$

SIGNATURE

By signing this worksheet, we certify that all the information is complete and correct:

Student's signature

Date

Parent's signature

Date

Submit this completed form to:

**Westmont College
Student Financial Services
955 La Paz Road
Santa Barbara, CA 93108
Email: sfs@westmont.edu**

Questions? Call our Student Financial Services Help Line at (888) 963-4624.