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2015–2016 Household Resources Worksheet Dependent Student

Your 2015–2016 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents.

If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

Please carefully read ALL instructions for each section PRIOR to completing each section. All fields marked with an asterisk (*) are required.

A. Dependent Student's Information

* _____ * _____ * _____ * _____
 Student's Last Name Student's First Name M.I. Student's Social Security Number

* _____ * _____
 Student's Street Address (include apt. no.) Student's Date of Birth

* _____ * _____ * _____ * _____
 City State Zip Code Student's Email Address

* _____ * _____
 Student's Home Phone Number (include area code) Student's Alternate or Cell Phone Number

B. Dependent Student's Family Information

List below the people in your household. Include:

- Yourself and your parent(s) (including a stepparent) even if you don't live with your parent(s).
- Both of your legal (biological or adoptive) parents if they live together, regardless of marital status or gender.
- Your parent(s)' other children if your parent(s) will provide more than half of their support from July 1, 2015, through June 30, 2016, or if the other children would be required to provide parental information if they were completing a FAFSA for 2015–2016. Include children who meet either of these standards, even if they do not live with your parent(s).
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2016.

Ensure ALL household members, that meet the above criteria, are included below. Include the full name (no abbreviations) of the college for any household member, excluding your parent(s), who will be enrolled at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2015, and June 30, 2016. Begin with yourself on line 2.

If more space is needed, attach a separate page with your name and Social Security Number at the top.

| Full Name | Age | Relationship | College | Will Be Enrolled at Least Half Time? |
|------------------------------|-----------|---------------|----------------------------------|--------------------------------------|
| <i>Marty Jones (example)</i> | <i>18</i> | <i>Sister</i> | <i>Central Community College</i> | <i>Yes</i> |
| | | Self | Kaplan University | |
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C. Dependent Student's Income Information to Be Verified

1. TAX RETURN FILERS—Important Note: If you, the student, filed or will file an amended 2014 IRS tax return, you must contact your financial aid administrator before completing this section.

Instructions: Complete this section if you, the student, filed or will file a 2014 income tax return with the IRS. The best way to verify income is by using the IRS Data Retrieval Tool that is part of the FAFSA on the Web. In most cases, no further documentation is needed to verify 2014 IRS income tax return information that was transferred into the student's FAFSA using the IRS Data Retrieval Tool if that information was not changed.

If you have not already used the tool, go to FAFSA.gov, log in to your FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2014 IRS income tax information into your FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool, see your financial aid administrator.

Check the box that applies (Select ONLY one):

The student has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2014 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. The student's school will use the IRS information that was transferred in the verification process.

The student has not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2014 IRS income information into the student's FAFSA once the student has filed a 2014 IRS tax return. See instructions above for information on how to use the IRS Data Retrieval Tool. The student's school cannot complete the verification process until the IRS information has been transferred into the FAFSA.

The student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and the student will submit to the school a 2014 IRS tax return transcript—not a photocopy of the income tax return. Go to <http://www.irs.gov/Individuals/Get-Transcript> to view and print your 2014 tax transcript immediately or request a copy by mail. Additional options include calling 1-800-908-9946 and requesting the "IRS tax return transcript" and not the "IRS tax account transcript," or downloading the IRS2GO mobile application (available for Android and iOS/Apple mobile devices). These self service options may take up to 10 business days to arrive at the specified address on file with the IRS. You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2014 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If this option is selected, you **MUST** select one box below.

Check here if the student's IRS tax return transcript is attached to this worksheet.

Check here if the student's IRS tax return transcript will be submitted to the student's school later. **If you have filed an extension, please read the instructions below.** Verification cannot be completed until the IRS tax return transcript has been submitted to the student's school.

Check here if an IRS tax extension has been granted for your 2014 taxes, and provide the following documents:

- A copy of the IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2014; and
- A copy of IRS Form W-2 for each source of employment income received for tax year 2014 and, if self-employed, a signed statement certifying the amount of the individual's AGI and the U.S. income tax paid for tax year 2014.

2. TAX RETURN NONFILERS—Complete this section if you, the student, will not file and are not required to file a 2014 income tax return with the IRS. If you made a selection in C1, do not complete this section. Only complete this section if you did not file a tax return.

Check the box that applies:

The student was not employed and had no income earned from work in 2014.

The student was employed in 2014 and has listed below the names of all the student's employers, the amount earned from each employer in 2014, and whether an IRS W-2 form is attached. Attach copies of all 2014 IRS W-2 forms issued to the student by employers. List every employer even if they did not issue an IRS W-2 form.

Do NOT list any federal benefits such as, Social Security Income, Social Security Disability, Supplemental Nutrition Assistance Program (SNAP), etc. If more space is needed, attach a separate page with your name and Social Security Number at the top.

| Employer's Name | 2014 Amount Earned | IRS W-2 Attached? |
|--|--------------------|-------------------|
| <i>Suzy's Auto Body Shop (example)</i> | \$2,000.00 | Yes |
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D. Parent's Income Information to Be Verified

Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

1. TAX RETURN FILERS—Important Note: If the student's parent(s) filed or will file an amended 2014 IRS tax return, the student's financial aid administrator must be contacted before completing this section.

Instructions: Complete this section if the student's parent(s) filed or will file a 2014 income tax return with the IRS. The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. In most cases, no further documentation is needed to verify 2014 IRS income tax return information that was transferred into the student's FAFSA using the IRS Data Retrieval Tool if that information was not changed. If you have not already used the tool, go to FAFSA.gov, log in to your FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2014 IRS income tax information into your FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool, see your financial aid administrator.

Check the box that applies (Select ONLY one):

The student's parent has used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2014 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. The student's school will use the IRS information transferred into the student's FAFSA to complete the verification process.

The student's parent has not yet used the IRS Data Retrieval Tool, but will use the tool to transfer 2014 IRS income information into the student's FAFSA once the parent's IRS tax return has been filed. See instructions above for information on how to use the IRS Data Retrieval Tool. The student's financial aid administrator cannot complete verification until the parent has transferred IRS information into the student's FAFSA.

The parent is unable or chooses not to use the IRS Data Retrieval Tool, and the parent will submit to the student's school a copy of the parent's 2014 IRS tax return transcript(s)—not photocopies of the income tax return. To obtain an IRS tax return transcript go to www.irs.gov and click on the "Order a Return or Account Transcript" link, or call 800.908.9946. Make sure you order the "IRS tax return transcript" and not the "IRS tax account transcript." The parent will need his or her Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2014 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers. If the parents are married, and separate 2014 tax returns were filed, 2014 IRS tax return transcripts must be submitted for each parent. If this option is selected, you **MUST** select one box below.

Check here if an IRS tax return transcript(s) is attached to this worksheet.

Check here if IRS tax return transcript(s) will be submitted to your school later. **If you have filed an extension, please read the instructions below.** Verification cannot be completed until the IRS tax return transcript(s) has been submitted to your school.

Check here if an IRS tax extension has been granted for your 2014 taxes, and provide the following documents:

- A copy of the IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2014; and
- A copy of IRS Form W-2 for each source of employment income received for tax year 2014 and, if self-employed, a signed statement certifying the amount of the individual's AGI and the U.S. income tax paid for tax year 2014.

2. TAX RETURN NONFILERS—Complete this section if the student's parent(s) will not file and are not required to file a 2014 income tax return with the IRS. If you made a selection in D1, do not complete this section. Only complete this section if you did not file a tax return.

Check the box that applies (Select ONLY one):

The parent(s) was not employed and had no income earned from work in 2014.

The parent(s) was employed in 2014 and has listed below the names of all the parent's employers, the amount earned from each employer in 2014, and whether an IRS W-2 form is attached. Attach copies of all 2014 IRS W-2 forms issued to the parent(s) by employer(s). List every employer even if they did not issue an IRS W-2 form.

Do NOT list any federal benefits such as, Social Security Income, Social Security Disability, Supplemental Nutrition Assistance Program (SNAP), etc. If more space is needed, attach a separate page with your name and Social Security Number at the top.

| Employer's Name | 2014 Amount Earned | IRS W-2 Attached? |
|--|--------------------|-------------------|
| <i>Suzy's Auto Body Shop (example)</i> | <i>\$2,000.00</i> | <i>Yes</i> |
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3. TAX RETURN FILERS AND NONFILERS—Complete this section regarding other untaxed income in 2014.

___ One of the persons listed in section B of this worksheet had untaxed income paid or received in 2014. If asked by my school, I will provide documentation of the payments or documentation of the receipt of benefits. You must complete the table below.

| Full Name | Amount paid to tax-deferred pensions and savings (only list terms listed on W-2 form in boxes 12a through 12d, and Codes D, E, F, H and S) | Amount of child support received (do not include foster care or adoption payments) | Amount of housing, food, and other living allowances paid to members of the Military and Clergy | Amount of Veteran's noneducational benefits received | Money received or paid on applicant's behalf | Other untaxed income received (such as worker's compensation, disability, etc) |
|------------------------------|--|--|---|--|--|--|
| <i>Missy Jones (example)</i> | <i>\$2,000</i> | <i>\$500</i> | <i>\$0</i> | <i>\$0</i> | <i>\$0</i> | <i>\$0</i> |
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E. Parent's Other Information to Be Verified

1. Complete this section if someone in the student's parent's household (listed in Section B) received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2013 or 2014 calendar years.

___ One of the persons listed in Section B of this worksheet received SNAP benefits in 2013 or 2014. If asked by the student's school, I will provide documentation of the receipt of SNAP benefits during 2013 or 2014.

2. Complete this section only if one or both of the student's parents paid child support in 2014. Do not include child support received.

___ One (or both) of the student's parents listed in Section B of this worksheet paid child support in 2014. The parent has indicated below the name of the person who paid the child support, the name of the person to whom the child support was paid, the names of the children for whom child support was paid, and the total annual amount of child support that was paid in 2014 for each child. If asked by the school, I will provide documentation of the payment of child support.

For child support paid, do not list agency or State. **Each child must be listed separately.** You must list the name of the person. If you need more space, attach a separate page that includes the student's name and Social Security Number at the top.

| Name of Person Who Paid Child Support | Name of Person to Whom Child Support Was Paid | Name of Child for Whom Child Support Was Paid | Age of Child | Amount of Child Support Paid in 2014 |
|---------------------------------------|---|---|--------------|--------------------------------------|
| <i>Marty Jones (example)</i> | <i>Chris Smith</i> | <i>Terry Jones</i> | <i>12</i> | <i>\$6,000.00</i> |
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Note: If we have reason to believe that the information regarding child support paid is not accurate, we may require additional documentation, such as:

- A copy of the separation agreement or divorce decree that shows the amount of child support to be provided;
- A statement from the individual receiving the child support certifying the amount of child support received; or
- Copies of the child support payment checks, money order receipts, or similar records of electronic payments having been made.

F. Certification and Signatures

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

I certify that all of the information reported on this worksheet is complete and correct. The student and parent must sign this worksheet.

Students attending Kaplan University online must provide their original signature using blue or black ink.

Student's Signature

Date

Parent's Signature

Date

Note: Do not mail this worksheet to the U.S. Department of Education. Submit this worksheet to the financial aid administrator at your school. You should make a copy of this worksheet for your records.