



2017-2018 Dependent Request For Additional Financial Information Worksheet for Federal Student Aid Programs at Monmouth College

The information you provide on this form will be used to verify financial aid records (including information provided on the FAFSA application), create emergency contact records, and build alumni records on the campus of Monmouth College, Monmouth, Illinois. The law states that we have a right and a responsibility to request, collect and verify this information before awarding federal aid.

A. Student Contact Information:

Last Name: _____ First Name: _____ M.I.: _____ SS#: _____-____-_____

Permanent Street Address: _____ Apt# _____ Birth date: _____

City: _____ State: _____ Zip: _____ Home Phone: _____

Preferred Email: _____ Cell Phone: _____

I live with my: (check all that apply)

- Father
 Mother
 Step-father
 Step-mother
 Guardian(s)
 Other: _____

B. Parent's Contact Information:

<input type="checkbox"/> Father's Information <input type="checkbox"/> Step-Father's Information	<input type="checkbox"/> Mother's Information <input type="checkbox"/> Step-Mother's Information
Full Legal Name:	Full Legal Name:
Street Address:	Street Address:
City, State, Zip:	City, State, Zip:
Home Ph#:	Home Ph#:
Cell Ph#:	Cell Ph#:
Employer:	Employer:
Position/Title:	Position/Title:
Work Ph#:	Work Ph#:
Preferred Email:	Preferred Email:

C. Household Information: : List below the people in the parents' household. Include:

- The student
- The parents (including stepparent) even if the student is not living with the parents.
- The parents' other children if the parents will provide more than half of the children's support from July 1, 2017 through June 30, 2018, or if the other children would be required to provide parental information if they were completing a FAFSA for 2017 – 2018. Include children who meet either of these standards, even if a child does not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of the support through June 30, 2018.

Number in college: Include in the space below information about any household member who is or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2017 and June 30, 2018, and include the name of the college. In order to verify the enrollment of family members using the National Student Clearinghouse, we will need their name, social security number and date of birth.

Full Legal Name	Relationship to you	Age	Date of Birth	Social Security # (to confirm enrollment)	If Enrolled (July 2017 – June 2018) list name of College below
1.	yourself		/ /	- -	
2.			/ /	- -	
3.			/ /	- -	
4.			/ /	- -	
5.			/ /	- -	
6.			/ /	- -	
7.			/ /	- -	
8.			/ /	- -	

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

PLEASE ANSWER ALL SECTIONS – DO NOT LEAVE BLANK

D. Student Tax Transcripts and Income Information: (check one)

Important Note: The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) which is part of the FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2015 income if the information was not changed by the FAFSA filer.

- The student has used the IRS DRT in the FAFSA on the Web to transfer 2015 IRS income tax return information into the student’s FAFSA.
- The student has not yet used the IRS DRT in the FAFSA on the Web but will use the tool to transfer 2015 IRS income tax return information into the student’s FAFSA by _____ (date).
- The Student is enclosing a 2015 U.S. (Federal) Income Tax Return Transcript I obtained from the Internal Revenue Service (IRS).
- The student is unable or chooses not to use the IRS DRT in the FAFSA on the Web, and instead will provide the school with a **2015 IRS Tax Return Transcript from the Internal Revenue Service (IRS) online at www.irs.gov or by phoning the IRS (1-800-908-9946).**
- The student is not required to file, nor filed, a 2015 U.S. (Federal) Income Tax Return. If marking this option, indicate sources of income below.
If you are not required to file a 2015 Federal income tax return but did work, list the name of your employer(s) and any income received in 2015.

Employer Name:	Amount:
Employer Name:	Amount:

E. Parent(s) Tax Transcripts and Income Information: (check one)

Important Note: The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) which is part of the FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2015 income if the information was not changed by the FAFSA filer.

- The parents have used the IRS DRT in the FAFSA on the Web to transfer 2015 IRS income tax return information into the student’s FAFSA.
- The parents have not yet used the IRS DRT in the FAFSA on the Web but will use the tool to transfer 2015 IRS income tax return information into the student’s FAFSA by _____ (date) .
- The Parents are enclosing a 2015 U.S. (Federal) Income Tax Return Transcript I obtained from the Internal Revenue Service (IRS).
- The parents are unable or choose not to use the IRS DRT in the FAFSA on the Web, and instead will provide the school with a **2015 IRS Tax Return Transcript from the Internal Revenue Service (IRS) online at www.irs.gov or by phoning the IRS (1-800-908-9946).** .
- The parents are not required to file, nor did they file, a 2015 U.S. (Federal) Income Tax Return. If marking this option, indicate sources of income below.
If parents are not required to file a 2015 Federal income tax return but did work, list the name of their employer(s) and any income received in 2015.

Employer Name:	Amount:
Employer Name:	Amount:

If parents are married and they filed separate 2015 IRS income tax returns, the IRS DRT cannot be used and paper **IRS Tax Return Transcript** must be provided for each.

- ___ Check here if both **2015 IRS Tax Return Transcripts** are enclosed.
- ___ Check here if both **2015 IRS Tax Return Transcripts** will be provided by _____ (date).

F. Other Untaxed Income in 2015 not viewable on a federal tax return: Please complete do not leave any question blank. If the answer does not apply, indicate by putting a \$0 or N/A.

- Money received, or paid on your behalf (e.g. bills), not reported elsewhere on this form. This includes money that you received from a parent whose financial information is not reported on this form and that is not parent of a legal child support agreement. Student \$_____ Parent \$_____
- Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits.) Don’t include the value of on-base military housing or the value of a basic military allowance for housing. Student \$_____ Parent \$_____
- Veterans non-education benefits, such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study Allowances. Student \$_____ Parent \$_____
- Other untaxed income not reported in items 45a through 45h (of the FAFSA), such as workers’ compensation, disability, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 – line 25. Don’t include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment ACT educational benefits, on-base military housing or military housing allowance, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels. Student \$_____ Parent \$_____
- Payments to tax-deferred pension and retirement savings plans paid directly or withheld from earnings, including but not limited to amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. Student \$_____ Parent \$_____

