

Please submit this document to your respective Financial Aid Office.

**STEP 1 – STUDENT INFORMATION**

<i>Last Name</i>	<i>First Name</i>	<i>Social Security Number</i>	<i>Student ID Number</i>
<i>Permanent Address</i>	<i>Street &amp; Number</i>	<i>City/State/Zip</i>	<i>Date of Birth</i>
<i>Local Phone Number (Include Area Code)</i>	<i>Permanent Phone Number (Include Area Code)</i>		<i>Email Address</i>

**STEP 2 – FAMILY INFORMATION**

If you are an **independent student**, include:

- ❖ Yourself
- ❖ Your spouse, if you are married.
- ❖ Your or your spouse’s children if you or your spouse will provide more than half of their support from July 1, 2023, through June 30, 2024, even if a child does not live with you.
- ❖ Other people if they now live with you and your spouse and you or your spouse provide more than half of their support and will continue to provide more than half of their support through June 30, 2024.

For 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, 2023, and June 30, 2024, include the name of the college.

*If more space is needed, please attach a separate page with your, the student’s, name and ID number at the top.*

<b>Full Name</b>	<b>Age</b>	<b>Relationship</b>	<b>Name of College/Degree Program (if at least half-time 2023-2024)</b>
		<i>Self</i>	<i>Columbia University in the City of New York</i>

**STEP 3 – STUDENT & SPOUSE TAX TRANSCRIPT & INCOME INFORMATION**

Complete this section if you and/or your spouse filed or will file a 2021 income tax return, or if you and/or your spouse will not file and are not required to file with the IRS or other relevant tax authority. *The best way to verify income from your 2021 US Federal tax return is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](https://fafsa.gov).*

**Check the box that applies to your 2021 income tax return:**

*It may be appropriate to select multiple boxes if you and your spouse have different responses to the elections below.*

- You and/or your spouse have used the IRS DRT in *FAFSA on the Web* to transfer 2021 IRS income tax return information into your FAFSA.
- You and/or your spouse have not yet used the IRS DRT in *FAFSA on the Web* but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA once the 2021 IRS income tax return has been filed.
- You and/or your spouse are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide a **2021 Tax Return Transcript(s) or a signed copy of your 2021 income tax return and applicable schedules from the IRS or other relevant tax authority.**
- You and/or your spouse will not file and are not required to file a 2021 income tax return. Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2021 that indicates a 2021 income tax return was not filed with the IRS or other relevant tax authority. Select below:
  - Check here if you and your spouse, if married were not employed and had no income earned from work in 2021
  - Check here if you and/or your spouse were employed and had income earned from work in 2021

Name of student and/or spouse who will not file and are not required to file a 2021 income tax return with the IRS or other relevant tax authority.

**Complete the table below only if you and/or your spouse did NOT file taxes and earned income in 2021:**

List below the names of all employers and the amount earned from each employer in 2021. You must provide an IRS W-2 or equivalent document for each source of income from employment listed.

Source of Income (Fill out for you and/or your spouse who did NOT file taxes)	Amount Earned in 2021
<b>TOTAL</b>	

**STEP 3 (continued) – STUDENT & SPOUSE TAX TRANSCRIPT & INCOME INFORMATION**

**Check the box that represents the verification of non-filing document provided for you and/or your spouse only if you and/or your spouse did NOT file taxes in 2021:**

*It may be appropriate to select multiple boxes if you and your spouse have different responses to the elections below.*

- Verification of non-filing is provided for you and/or your non-filing spouse.
- Verification of non-filing will be provided for you and/or your non-filing spouse later.
- Your and/or your non-filing spouse have attempted and are unable to obtain verification of non-filing from the IRS or other relevant tax authority.
- Your spouse is ineligible to obtain verification of non-filing from the IRS or other relevant tax authority.  
**Check the box that applies to your spouse’s ineligibility to obtain verification of non-filing:**
  - Non-filing individual(s) in foreign countries that do not have a tax authority.  
Non-filing individual(s) in foreign countries whose tax authority does not provide verification of non-filing or similar documentation.*
  - Domestic non-filing individual(s) who do not have a Social Security Number (SSN), Employee Identification Number (EIN),*
  - or Individual Taxpayer Identification Number (ITIN). These individuals must provide a signed statement with the students name and ID number at the top certifying they do not have a SSN, an ITIN, or an EIN and listing the sources and amounts of earnings, other income, and resources that supported them for the 2021 tax year.*

**STEP 4 – CERTIFICATION**

**By signing this worksheet, I certify all the information reported is complete and correct:**

<i>Student Signature</i>	<i>Date</i>	<i>Student Name (Please Print)</i>	<i>Student ID Number</i>
<i>Spouse Signature</i>	<i>Date</i>	<i>Spouse (Please Print)</i>	

**NOTE:** *Additional documents and/or information beyond those listed in this form may be needed to satisfy the requirements of Verification. Your respective Financial Aid Office will notify you of additional requirements, if applicable.*