

# MACALESTER

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## 2023-2024 VERIFICATION WORKSHEET - DEPENDENT

Student Name: \_\_\_\_\_ Macalester ID #: \_\_\_\_\_

### SECTION A: FEDERAL STUDENT AID HOUSEHOLD INFORMATION

List all household members, including custodial parent(s) (see definition below), *regardless of whether they will enroll as college or university students during 2023-2024*. Under "College Attended", indicate (if applicable) who will enroll in college on at least a half-time basis *between July 1, 2023 and June 30, 2024*. Attach additional pages if needed.

**Include:**

- **Your custodial parent(s)**. If your biological/adoptive parents do not live together, your custodial parent (for Federal Student Aid purposes) is the parent you lived with more during the past 12 months. If you did not live with one parent more than the other, include the parent who provided more financial support during the last 12 months. Your custodial parent's current spouse should be included, if applicable.
- **Your custodial parents' dependent children** if they will receive more than half of their support from your custodial parent(s) or if they would be required to provide parental information when applying for Federal Student Aid.
- **Others** only if they will live with and receive more than half of their support from your custodial parent(s) between July 1, 2023 and June 30, 2024.
- *If your biological or adoptive parents live in the same household, both parents should be included (regardless of marital status).*

Name	Relationship To Student	Age	2023-2024 College Attended (if applicable)	2023-2024 Enrollment Level	2023-2024 Year in College	Degree Sought
<u>You, the Macalester Student</u>	<u>Self</u>	_____	<u>Macalester</u>	<input type="checkbox"/> Not Applicable <input type="checkbox"/> Full-time <input type="checkbox"/> At least ½ time <input type="checkbox"/> Less than ½ time	_____	<input type="checkbox"/> Graduate <input type="checkbox"/> Undergraduate <input type="checkbox"/> None
_____	_____	_____	_____	<input type="checkbox"/> Not Applicable <input type="checkbox"/> Full-time <input type="checkbox"/> At least ½ time <input type="checkbox"/> Less than ½ time	_____	<input type="checkbox"/> Graduate <input type="checkbox"/> Undergraduate <input type="checkbox"/> None
_____	_____	_____	_____	<input type="checkbox"/> Not Applicable <input type="checkbox"/> Full-time <input type="checkbox"/> At least ½ time <input type="checkbox"/> Less than ½ time	_____	<input type="checkbox"/> Graduate <input type="checkbox"/> Undergraduate <input type="checkbox"/> None
_____	_____	_____	_____	<input type="checkbox"/> Not Applicable <input type="checkbox"/> Full-time <input type="checkbox"/> At least ½ time <input type="checkbox"/> Less than ½ time	_____	<input type="checkbox"/> Graduate <input type="checkbox"/> Undergraduate <input type="checkbox"/> None
_____	_____	_____	_____	<input type="checkbox"/> Not Applicable <input type="checkbox"/> Full-time <input type="checkbox"/> At least ½ time <input type="checkbox"/> Less than ½ time	_____	<input type="checkbox"/> Graduate <input type="checkbox"/> Undergraduate <input type="checkbox"/> None
_____	_____	_____	_____	<input type="checkbox"/> Not Applicable <input type="checkbox"/> Full-time <input type="checkbox"/> At least ½ time <input type="checkbox"/> Less than ½ time	_____	<input type="checkbox"/> Graduate <input type="checkbox"/> Undergraduate <input type="checkbox"/> None

## SECTION B: STUDENT'S TAX FILING STATUS IN 2021

Have you, the student, filed or are you required to file a 2021 federal income tax return?

\_\_\_\_ **YES**      The income information you provided on the FAFSA must be verified. This can be done in one of three ways:

I used the IRS Data Retrieval Tool to transfer my 2021 tax data to the 2023-2024 FAFSA. (This is usually the most expedient method of verifying income information.)

*More information about this process:  
[macalester.edu/financialaid/DataRetrieval](http://macalester.edu/financialaid/DataRetrieval)*

I will provide a signed copy of my 2021 federal tax return.

If I cannot use the IRS Data Retrieval Tool or provide a signed copy of my 2021 federal tax return, I will provide a copy of my 2021 IRS tax return transcript to the financial aid office (you can order tax return transcripts at [irs.gov](http://irs.gov) or by calling 1-800-908-9946).

*More information about this process:  
[macalester.edu/financialaid/TaxReturnTranscripts](http://macalester.edu/financialaid/TaxReturnTranscripts)*

For more information about verifying income, please visit [macalester.edu/financialaid/apply/verification](http://macalester.edu/financialaid/apply/verification).

\_\_\_\_ **NO**      Complete and submit a 2021 Non-Tax Filer Statement ([macalester.edu/financialaid/forms](http://macalester.edu/financialaid/forms)).

## SECTION C: PARENT(S) TAX FILING STATUS IN 2021

Have you, the parent(s), filed or are you required to file a 2021 federal income tax return?

\_\_\_\_ **YES**      The income information you provided on the FAFSA must be verified. This can be done in one of three ways:

I used the IRS Data Retrieval Tool to transfer my 2021 tax data to the 2023-2024 FAFSA. (This is usually the most expedient method of verifying income information.)

*More information about this process:  
[macalester.edu/financialaid/DataRetrieval](http://macalester.edu/financialaid/DataRetrieval)*

I will provide a signed copy of my 2021 federal tax return.

If I cannot use the IRS Data Retrieval Tool or provide a signed copy of my 2021 federal tax return, I will provide a copy of my 2021 IRS tax return transcript to the financial aid office (you can order tax return transcripts at [irs.gov](http://irs.gov) or by calling 1-800-908-9946).

*More information about this process:  
[macalester.edu/financialaid/TaxReturnTranscripts](http://macalester.edu/financialaid/TaxReturnTranscripts)*

For more information about verifying income, please visit [macalester.edu/financialaid/apply/verification](http://macalester.edu/financialaid/apply/verification).

\_\_\_\_ **NO**      Complete and submit a 2021 Non-Tax Filer Statement ([macalester.edu/financialaid/forms](http://macalester.edu/financialaid/forms)). Parents must also provide a Verification of Non-Filing Letter from the IRS. More information is available on the Non-Tax Filer Statement and at [macalester.edu/financialaid/nonfiling.html](http://macalester.edu/financialaid/nonfiling.html).

## SECTION D: CERTIFICATION

By signing this worksheet, we certify that all information on this application is complete and correct. **Both student and parent signature are required. Please provide physical signatures (as opposed to electronic signatures).**

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Date