

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 & 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, 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.
- ❖ 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, 2018.

For any household member who 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, 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.

| Full Name | Age | Relationship | Name of College/Degree Program <i>(if at least half-time 2017-2018)</i> |
|-----------|-----|--------------|--|
| | | <i>Self</i> | <i>Columbia University in the City of New York</i> |
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STEP 3 – STUDENT & SPOUSE TAX TRANSCRIPT & INCOME INFORMATION

Complete this section if you and/or your spouse filed, will file or will not file a 2015 IRS income tax return. *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov.*
Check the box that applies if you filed or will file a 2015 IRS income tax return:

You and/or your spouse have used the IRS DRT in *FAFSA on the Web* to transfer 2015 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 2015 IRS income tax return information into the student’s FAFSA once the 2015 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 the school a **2015 IRS Tax Return Transcript**.

You and/or your spouse will not file a 2015 IRS income tax return, complete the table below and attach copies of ALL 2015 W-2 forms and continue to STEP 4.

| Source of Income (Fill out only if you did NOT file taxes) | Amount Earned in 2015 |
|---|--------------------------|
| | |
| | |
| | |
| TOTAL | |

NOTE: We cannot accept a signed copy of the tax return. To request a Tax Return Transcript or a “W-2 Wage Summary” (if you did not keep a copy of your W-2 form) call the IRS at 800.829.1040. Please be advised that it may take a minimum of three weeks for the IRS to mail these documents to you.

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> |
|-------------------------|-------------|------------------------------|