

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, 2019, through June 30, 2020, 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, 2020.

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, 2019, and June 30, 2020, 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 2019-2020)</i>
		<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, will file or will not file a 2017 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](http://FAFSA.gov).*  
**Check the box that applies if you filed or will file a 2017 IRS income tax return:**

You and/or your spouse have used the IRS DRT in *FAFSA on the Web* to transfer 2017 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 2017 IRS income tax return information into the student’s FAFSA once the 2017 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 **2017 IRS Tax Return Transcript(s)**.

You are attaching a signed copy of your and/or your spouse tax return. Tax returns include the 2017 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return.

You and/or your spouse will not file a 2017 IRS income tax return. Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2018 that indicates a 2017 IRS income tax return was not filed with the IRS or other relevant tax authority. Complete the below:

- Check here if confirmation of non-filing is provided, OR
- Check here if confirmation of non-filing will be provided later.

Source of Income (Fill out only if you did NOT file taxes)	Amount Earned in 2017
<b>TOTAL</b>	

**NOTE: 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 800.908.9946. 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:**

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