

MARIST OFFICE OF STUDENT FINANCIAL SERVICES

Financial Aid Application for Academic Year 2018 - 2019

Your file has been selected for a process called verification. As a part of this process, please complete, sign, and return this form to the Office of Student Financial Services.

Financial aid cannot be processed until verification has been completed. Failure to submit all student requirements in a timely manner may impact financial aid eligibility. **Upon review of the documentation submitted, additional information may be required.**

Need-based aid is estimated until this process is complete. The student will be notified electronically if FAFSA corrections result in changes/cancellation of estimated award(s).

IMPORTANT NOTICES:

Due to federal regulations, the 2018-2019 FAFSA application is based on **2016** income (rather than 2017). The taxed and untaxed income reported on this form should pertain to the **2016** year.

The IRS Data Retrieval Tool is functional once again!

The Department of Education has reinstated the IRS Data Retrieval Tool (DRT) for the 2018-2019 aid year. This tool will allow filed 2016 federal tax return data to be uploaded directly to the FAFSA from the IRS. If you haven't already done so, we strongly encourage you to use this tool as it is the best way to provide verified tax information. In most cases, no further tax documentation will be needed to verify 2016 income information that was transferred into the FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

If the IRS Data Retrieval is not used, per Federal Regulations, the Office of Student Financial Services will require copies of Federal Tax Return Transcripts. Please do not send copies of your paper tax returns, unless specifically requested by our office.

Section A: Student Information

Note: To be considered for financial assistance (of any type), you must have applied, been accepted for admission, and must be enrolled and matriculated in a degree or Title IV eligible certificate program.

1. Name: _____
Last First M CWID (Campus Wide ID Number)

2. Address: _____
Street

City State Zip Code Home Telephone Number

2a. Have you had a recent address change? YES NO

If you recently changed your address, please ensure that your most current address is on file with the Registrar's Office.

3. _____
Cell Phone Number E-mail Address

4. Date of High School graduation or GED _____ Expected date of graduation from Marist College _____

5. Will you receive any scholarships, grants or tuition reimbursement from sources other than Marist College or the Federal Government? YES NO If "Yes," list source and amount: _____

Note: If you receive tuition reimbursement or assistance, you may not be eligible for a Marist Grant. If you receive financial aid from an outside source after you have submitted this application, you must promptly notify the Office of Student Financial Services.

Section B: Student's and/or Spouse's Tax Information

If you filed or will file a 2016 Federal Income Tax return, check the box below that applies:

- The student has used or will use the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2016 IRS Income Information into the student's FAFSA, either on the initial FAFSA or when making a correction. **If this option is selected, please do not send Federal Tax Return Transcripts.**
- The student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and the student and spouse, if married, will submit a signed **2016 IRS Tax Return Transcript – Not a copy of the income tax return.** Federal Tax Return Transcripts can be obtained online or by mail at <http://www.irs.gov/Individuals/Get-Transcript>. **Please be sure to request a Tax Return Transcript and not a Tax Account Transcript.**

NOTE: If the student and/or spouse filed an amended 2016 Federal Tax Return (Form 1040X), a signed 2016 IRS Tax Return Transcript along with a signed copy of the 2016 1040X amended return are required.

Student's and/or Spouse's Non Tax Filing Statement- Please disregard the section in gray below if you checked one of the boxes above indicating a 2016 federal income tax return was filed.

If you did not file and are not required to file a 2016 Federal Income Tax return, please check the appropriate box or boxes:

- Student Spouse
- The student (and/or the student's spouse, if married) was not employed and had no income earned from work in 2016.
- The student (and/or the student's spouse, if married) was employed in 2016 and has listed below the names of all employers and the amount earned from each employer in 2016. **Attach copies of all 2016 W-2 forms** issued to the student (and/or the student's spouse, if married). **List every employer even if the employer did not issue a W-2.**

Employer or Source of Income	2016 Amount
	\$
	\$

For Independent Students Only:

If you and/or your spouse did not file a 2016 Federal Income Tax Return, IRS Form 4506-T must be completed and submitted to the Office of Student Financial Services with this form. IRS Form 4506-T will be used to request a Verification of Nonfiling letter from the IRS confirming that a 2016 Federal Income Tax Return was not filed. You may complete the IRS Form 4506-T at <http://www.marist.edu/financialaid/forms.html> or by clicking on the link under the "Financial Aid Requirements" section of myMarist.

Untaxed Income:

List other income and benefits that you (and your spouse, if applicable) received during 2016 that are **not subject to income taxes**. Please attach documentation, if available, to verify these figures. Do not include financial aid.

DO NOT LEAVE THIS SECTION BLANK. IF A SOURCE OF INCOME DOES NOT APPLY, PLEASE INDICATE "0."

Sources of Untaxed Income	2016 Amount
A. Child Support Received for any of your children. Don't include foster care, adoption payments, or any amount that was court-ordered but not actually paid.	\$ _____ /mo.x _____ mos.= \$ _____ .00 Name of Adult Who Received the Support _____ Name of Child(ren) for Whom Support Was Received _____
B. Workers' Compensation	\$ _____ /mo.x _____ mos.= \$ _____ .00
C. Any other sources of untaxed income or money received, or paid on your behalf Please Specify: _____	\$ _____ /mo.x _____ mos.= \$ _____ .00

NOTE: If you are considered a dependent student according to the FAFSA form you completed, you must provide your parent(s)' information and signature on the following page. Independent undergraduate students or graduate students should skip to "Section D." A spouse signature is required if the spouse completed the Non-Tax Filing Section.

Section C: Parent(s)' Tax Information for Dependent Students Only

If your parent(s) filed or will file a 2016 Federal Income Tax return, check the box below that applies:

- The parent/step parent has used or will use the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2016 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction. **If this option is selected, please do not send Federal Tax Return Transcripts.**
- The parent/step parent is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and will submit a signed **2016 IRS Tax Return Transcript – Not a copy of the income tax return.** Federal Tax Return Transcripts can be obtained online or by mail at <http://www.irs.gov/Individuals/Get-Transcript>. **Please be sure to request a Tax Return Transcript and not a Tax Account Transcript.**

NOTE: If the parent filed an amended 2016 Federal Tax Return (Form 1040X), a signed 2016 IRS Tax Return Transcript along with a signed copy of the 2016 1040X amended return are required.

Parent(s)' Non Tax Filing Statement- Please disregard the section in gray below if one of the boxes above are checked indicating a 2016 federal income tax return was filed.

If the parent(s) did not file and are not required to file a 2016 Federal Income Tax return, please check the appropriate box or boxes:

- Neither parent was employed and neither had income earned from work in 2016.
- One or both parents were employed in 2016 and have listed below the names of all employers and the amount earned from each employer in 2016. **Attach copies of all 2016 W-2 forms. List every employer even if the employer did not issue a W-2.**

Employer or Source of Income	2016 Amount
	\$
	\$

If the parent did not file a 2016 Federal Income Tax Return, **IRS Form 4506-T** must be completed and submitted to the Office of Student Financial Services with this form. IRS Form 4506-T will be used to request a Verification of Nonfiling letter from the IRS confirming that a 2016 Federal Income Tax Return was not filed. Parents may complete the IRS Form 4506-T at <http://www.marist.edu/financialaid/forms.html>

Untaxed Income:

List other income and benefits that the parent(s) received during 2016 that are **not subject to income taxes**. Please attach documentation, if available, to verify these figures. Do not include student financial aid.

DO NOT LEAVE THIS SECTION BLANK. IF A SOURCE OF INCOME DOES NOT APPLY, PLEASE INDICATE "0."

Sources of Untaxed Income	2016 Amount
B. Child Support Received for any of your children. Don't include foster care, adoption payments, or any amount that was court-ordered but not actually paid.	\$ _____ /mo.x _____ mos.= \$ _____ .00 Name of Adult Who Received the Support _____ Name of Child(ren) for Whom Support Was Received _____
B. Workers' Compensation	\$ _____ /mo.x _____ mos.= \$ _____ .00
C. Any other sources of untaxed income or money received, or paid on your behalf Please Specify: _____	\$ _____ /mo.x _____ mos.= \$ _____ .00

Section D: Family Information

Dependent students: List the people in your parent(s)' household, including:

- Yourself and your parent(s) even if you don't live with them (*If your legal parents are separated/divorced and do not live together, list the parent you lived with more during the 12 months prior to filing the FAFSA and their spouse, if remarried*)
- Your parent(s)' other children if your parents will provide more than half of their support from **July 1, 2018 through June 30, 2019**, or if the children would be required to provide parental information when completing a FAFSA for 2018-2019. Include children who meet either of these standards, even if they do not live with your parents
- Other people if they now live with your parents and your parents provide more than half of their support and will continue to provide more than half of their support through **June 30, 2019**

Independent students: List the people in your household, including:

- Yourself, and your spouse, if married
- Your children or step-children if you or your spouse will provide more than half of their support from **July 1, 2018 through June 30, 2019**, even if the children do not live with you
- Other people if they now live with you 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, 2019**

Write the names of all household members in the spaces below. Also write in the name of the college for any household member, excluding college names for your parent and any household member attending U.S. Military Service Academies. Only include college names for students who will be attending college at least half-time between **July 1, 2018 and June 30, 2019**, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Date of Birth	Relationship	College*	Enrolled At Least Half Time?
		Student/Self	Marist College	Yes

***NOTE: Marist College may verify college enrollment of household members via the National Student Clearinghouse after October 15, 2018. If college enrollment cannot be confirmed, the student's FAFSA will be updated, which may result in a retroactive change or cancellation of need-based financial aid.**

Child Support Paid Verification:

Did you, your spouse or your parent/step-parent pay child support in 2016? Yes No If Yes, please answer the following:

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name and Age of Child for Whom Support Was Paid	Amount of Child Support Paid in 2016

Signature of Person who Paid Child Support: _____ Date: _____

Section E: Signature(s)

I certify that the information provided on this application is complete and true to the best of my knowledge and I will notify the Office of Student Financial Services of any changes to the information provided on my financial aid application and/or any additional assistance that I receive for educational expenses. **WARNING: Per federal regulation, if you purposely give false or misleading information on this worksheet you may be fined and/or sentenced to jail.**

The Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. §1232g; 34 CFR Part 99) is a federal law that protects the privacy of student education records. The law applies to all schools that receive funds under an applicable program of the U.S. Department of Education. For more information visit: www.ed.gov/policy/gen/guid/fpco/ferpa/index.html

For dependent students: Please note your signature authorizes your student financial information to be released to and discussed with the parent/stepparent(s) listed in Section D of the application. If you wish to restrict access to your student financial information while attending Marist College, please e-mail the Office of Student Financial Services at studentfinancialservices@marist.edu.

Student's Signature

Date

Parent's Signature

Date

Please Return all documentation to:

Office of Student Financial Services • Marist College • 3399 North Road • Poughkeepsie, NY 12601-1387

Please fax form to: (845) 575-3099 • Please email form to: studentfinancialservices@marist.edu For more information go to: www.marist.edu/sfs

PLEASE ALLOW AT LEAST TWO WEEKS FOR PROCESSING