



FAILURE TO COMPLETE THE VERIFICATION PROCESS IMMEDIATELY WILL RESULT IN THE FORFEIT OF FEDERAL STUDENT AID ELIGIBILITY.

Last Name	First Name
Student ID H00	Social Security Number
Home Phone	Cell Phone

SECTION A – HOUSEHOLD INFORMATION

(See notes on page 4 for assistance determining who to include in this section)

Full Name	Date of Birth	Relationship	COLLEGE attending in 2018-2019
		Self (student)	Hudson Valley Community College

SECTION B – CURRENT VALUE OF STUDENT ASSETS

(See notes on page 4 for assistance)

Asset Type	Amount of Assets
Current balance of cash, savings and checking accounts	\$
Net worth of your current investments	\$
Net worth of current business and/or investment farm	\$

SECTION C – STUDENT 2016 TAX INFORMATION

(IF YOU DID NOT FILE TAXES IN 2016 SKIP TO SECTION D)

Provide the Financial Aid Office with copies of all 2016 IRS W-2 forms issued to the student and spouse by their employers.

AND check the applicable box below:

The student/spouse has already used the IRS Data Retrieval Tool in *FAFSA on the Web* to transfer 2016 IRS income tax return information into the student’s FAFSA.

The student/spouse has not yet used the IRS Data Retrieval Tool in *FAFSA on the Web*, but will use the tool to transfer 2016 IRS income tax return information into the student’s FAFSA.

The student/spouse is unable to use the IRS Data Retrieval Tool in FAFSA on the Web, and instead will provide the school with a **2016 IRS Tax Return Transcript(s)**.

A **2016 IRS Tax Return Transcript** may be obtained through:

- Get Transcript ONLINE or by MAIL – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online" or "Get Transcript by Mail". Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

HVCC Financial Aid Office
80 Vandenberg Ave
Troy, NY 12180

Phone 518-629-7150
Fax 518-629-7479
financialaid@hvcc.edu

Guenther Room 110
Monday-Friday
8AM-5PM

SECTION D - STUDENT NON-TAX FILERS 2016 INCOME INFORMATION

Complete this section if the student and/or spouse will not file and are not required to file a 2016 income tax return with the IRS. (Please refer to notes on page 4 for where to locate the 2016 IRS filing requirements.)

If the student is independent, you must also provide documentation from the IRS that indicates a 2016 IRS income tax return was not filed by student and/or spouse. You can obtain a non-filing statement from the IRS by submitting IRS Form 4506-T. *This requirement does not apply to dependent students.*

Check the box that applies:

The student and/or spouse were not employed and had no income earned from work in 2016.

The student and/or spouse were employed in 2016 but did not file and were not required to file a federal tax return.

Provide the Financial Aid Office with copies of all 2016 IRS W-2 forms issued to the student and/or spouse by their employers

SECTION E - STUDENT OTHER INCOME & ASSISTANCE

Between Jan 1, 2016 and December 31, 2016:	NO	YES
Did you receive Medicaid or Supplemental Security Income (SSI)?		
Did you receive Supplemental Nutrition Assistance (SNAP)?		
Did you receive Free or Reduced Price School Lunch?		
Did you receive Temporary Assistance for Needy Families (TANF)?		
Did you receive Special Supplemental Nutrition Program for Women, Infants, & Children (WIC)?		
Did you receive Subsidized/ Section 8 housing?		
Did you receive Social Security Disability (SSD)?		

DURING THE 2016 CALENDER YEAR:	NO	YES	AMOUNT <small>*Please indicate whether received weekly, bi-weekly or monthly</small>
Did you pay child support? List all child(ren) for whom the child support was paid: _____ List the person(s) who received the child support you paid: _____			\$
Did you receive child support? (Do not include foster care or adoption payments)			\$
Did you report college grant/scholarship aid to the IRS as income? (includes Americorps benefits, as well as grant and scholarship portions of fellowships and assistantships.)			\$
Did you receive housing, food and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)?			\$
Did you receive veterans' non education benefits (disability, death pension, etc.)?			\$
Did you receive Worker's Compensation?			\$
Did you receive disability OTHER THAN Social Security Disability?			\$
Did you have taxable earnings from need-based employment programs? (federal work study, fellowship, assistantship or a co-operative education program)			\$

SECTION F - STUDENT LIVING SITUATION

Where did you live in 2016?
Lived with parents
Owned or rented your home/apartment
<p>3rd Party (e.g. rehabilitation center, homeless shelter, correctional facility)</p> <p>Please provide name and location of the 3rd Party: _____</p> <p>Did this 3rd Party provide all of your living expenses in 2016?: YES or NO</p> <p>Please provide us with ALL relevant information (including dates and support provided):</p> <p>_____</p> <p>_____</p>
<p>Lived with a friend, significant other, legal guardian, relative (NOT A PARENT)</p> <p>Please provide their name and relationship to you: _____</p> <p>Did this person give you any money in 2016 to cover living expenses?: YES or NO</p> <p>If YES, provide amount for 2016: \$ _____</p> <p>If NO, did this person provide all of your support in 2016 without giving you money? YES or NO</p> <p>Please provide us with ALL relevant information (including dates and support provided):</p> <p>_____</p> <p>_____</p>

SECTION G - STUDENT SIGNATURE

PLEASE READ & SIGN: By signing this worksheet, I certify the information reported is complete and correct.

WARNING: Purposely giving false or misleading information may result in fines, imprisonment or both.

STUDENT SIGNATURE	DATE
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IF YOU ARE AN INDEPENDENT STUDENT



IF YOU ARE A DEPENDENT STUDENT CONTINUE ON TO PAGE 5

(See notes on page 4 for clarification)

NOTES

Independent vs. Dependent

A student is considered dependent unless they are born before January 1, 1995, are married, a veteran of the US Armed Forces, serving on active duty in the US Armed Forces, homeless, orphan/ward of the court or under legal guardianship.

-Independent students must complete Section A-G. -Dependent students must complete Sections A-M.

Section A (HOUSEHOLD INFORMATION)

-Independent Household (Section A) includes student, spouse, and child(ren) that the student supports more than 50% from 7/1/2018-6/30/2019.

-Dependent Household (Section A) includes student, parent(s)* and sibling(s) (under the age of 24) that parents support more than 50% from 7/1/2018-6/30/2019.

*Parent(s) in household include either: 1) one or both biological/adoptive parents (depending on their marital status and if they both live in the household OR 2) one biological/adoptive parent PLUS one step-parent (if re-married)

Section B and/or H (ASSETS INFORMATION)

Net worth means current value minus debt. If net worth is \$1 million or more, enter \$999,999. If net worth is negative, enter \$0.

Investments INCLUDE real estate (do not include the home you live in), rental property, trust funds, UGMA and UTMA accounts for which you are the owner of, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc. Investment value includes the market value of these investments as of today. Investment debt means only those debts that are related to the investments. Investments also include qualified educational benefits or education savings accounts that student or parents own (Coverdell and 529 college savings plans and the refund value of 529 prepaid tuition plans).

Investments DO NOT INCLUDE the home you live in, the value of life insurance and retirement plans (401[k] plans, pension funds, annuities, non- education IRAs, Keogh plans, etc.), Investments also do not include UGMA and UTMA accounts for which you are the custodian, but not the owner.

Business and/or investment farm value includes the market value of land, buildings, machinery, equipment, inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral. **Do not include** the value of a small business if your family owns and controls more than 50 % of the business and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, your family includes (1) persons directly related to you, such as a parent, sister, cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law. **Investment farm does not include** the value of a family farm that you (your spouse/parents) live on and operate.

Section D and/or J (NON-TAX FILERS INFORMATION)

If, according to IRS regulation, the student/spouse and/or parent(s) were required to file a 2016 federal tax return but failed to do so, all financial aid processing will be delayed until the return is filed, processed by the IRS and appropriate documentation is submitted to the Financial Aid Office. Information regarding filing limits can be found in the 2016 IRS Publication 17 online at www.irs.gov. (See page 7 for dependent students. See page 5 for independent students/parents.)

THE FOLLOWING SECTIONS ARE TO BE COMPLETED BY PARENT(S)

SECTION H – CURRENT VALUE OF PARENT ASSETS

(See notes on page 4 for assistance)

Asset Type	Amount of Assets
Current balance of cash, savings and checking accounts	\$
Net worth of your current investments	\$
Net worth of current business and/or investment farm	\$

SECTION I - PARENT 2016 TAX INFORMATION

(IF YOU DID NOT FILE TAXES IN 2016 SKIP TO SECTION J)

Important Note: The instructions below apply to each parent included in the household. Notify the Financial Aid Office if the parents filed separate IRS income tax returns for 2016 or had a change in marital status after December 31, 2016.

Provide the Financial Aid Office with copies of all 2016 IRS W-2 forms issued to the parent(s) by their employers

AND check the applicable box below:

The parent(s) have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2016 IRS income tax return information into the student's FAFSA.

The parent(s) have not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to transfer 2016 IRS income tax return information into the student's FAFSA.

The parent(s) are unable to use the IRS Data Retrieval Tool in FAFSA on the Web, and instead will provide the school with a **2016 IRS Tax Return Transcript(s)**.

A **2016 IRS Tax Return Transcript** may be obtained through:

- Get Transcript ONLINE or by MAIL – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online" or "Get Transcript by Mail". Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

SECTION J - 2016 INCOME INFORMATION FOR PARENT NON-TAX FILERS

Complete this section if the parents will not file and are not required to file a 2016 income tax return with the IRS. (Please refer to notes on page 4 for where to locate the 2016 IRS filing requirements.)

You must provide documentation to the Financial Aid Office from the IRS that indicates a 2016 IRS income tax return was not filed with the IRS. You can obtain a non-filing statement from the IRS by submitting IRS Form 4506-T.

Check the box that applies:

Neither parent was employed, and neither had income earned from work in 2016.

One or both parents were employed in 2016 but did not file and were not required to file a federal tax return.

Provide the Financial Aid Office with copies of all 2016 IRS W-2 forms issued to the parent(s) by their employers

SECTION K - PARENT(S) OTHER INCOME & ASSISTANCE

Between Jan 1, 2016 and December 31, 2016:	NO	YES
Did you receive Medicaid or Supplemental Security Income (SSI)?		
Did you receive Supplemental Nutrition Assistance (SNAP)?		
Did you receive Free or Reduced Price School Lunch?		
Did you receive Temporary Assistance for Needy Families (TANF)?		
Did you receive Special Supplemental Nutrition Program for Women, Infants, & Children (WIC)?		
Did you receive Subsidized/ Section 8 housing?		
Did you receive Social Security Disability (SSD)?		

DURING THE 2016 CALENDER YEAR:	NO	YES	AMOUNT *Please indicate whether received weekly, bi-weekly or monthly
Did you pay child support? List all child(ren) for whom the child support was paid: List the person(s) who received the child support you paid:			\$
Did you receive child support? (Do not include foster care or adoption payments)			\$
Did you report college grant/scholarship aid to the IRS as income? (includes Americorps benefits, as well as grant and scholarship portions of fellowships and assistantships.)			\$
Did you receive housing, food and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)?			\$
Did you receive veterans' non education benefits (disability, death pension, etc.)?			\$
Did you receive Worker's Compensation?			\$
Did you receive disability OTHER THAN Social Security Disability (SSD)?			\$
Did you have taxable earnings from need-based employment programs? (federal work study, fellowship, assistantship or cooperative education program)			\$

SECTION L - OTHER RELEVANT INFORMATION FOR PARENT(S)

If parent(s) did not have income AND did not receive any type of assistance for 2016, please provide an explanation regarding how the family was supported in 2016:

SECTION M - PARENT SIGNATURE

PLEASE READ & SIGN: By signing this worksheet, I certify the information reported is complete and correct.

WARNING: Purposely giving false or misleading information may result in fines, imprisonment or both.

PARENT SIGNATURE	DATE
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