



25-26 Family Size Verification Worksheet "Independent" Student

Student's Last Name

Student's First Name

Coe ID (if known)

Your application was selected for review in a process called "Verification." We will compare your FAFSA information with this worksheet and your 2023 income documentation and let you know if any corrections are required. This verification process must be completed before your financial aid can be finalized and approved for disbursement.

Family Size - Includes the following:

- The student.
- The student's spouse, if applicable.
- The student's dependent children if the following are true:
 - They live with the student (or live apart because of college enrollment);
 - They receive more than half of their support from the student; and
 - They will continue to receive more than half their support from the student during the award year.
- Other persons if the following are true:
 - They live with the student;
 - They receive more than half of their support from the student; and
 - They will continue to receive more than half their support from the student during the award year.

The provided criteria for "dependent children" or "other persons" align with the requirement that family size align with whom the parent could claim as a dependent on a U.S. tax return if the student were to file a U.S. tax return at the time of completing a 2025-2026 FAFSA. As a result, the student should not include any unborn children in the family size.

If more space is needed, provide a separate page with the student's name and ID number at the top:

[illegible]

Student and Spouse(if student is married) 2023 IRS Income Tax Verification

Complete this section if the student and spouse filed or will file a 2023 IRS income tax return(s). As part of federal student aid eligibility, students, and spouses(as appropriate), will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. If the student and spouse filed separate 2023 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2023 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS via the FA-DDX.

If 2023 income tax return information for the student(or spouse, if applicable) was not transferred via the FA-DDX and considered verified, the student should provide the institution with a 2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules.

Check the box that applies:

- ☐ Used the Direct Data Exchange to transfer my 2023 IRS income information into the FAFSA.
- ☐ Did not use the Direct Data Exchange and will submit a 2023 **IRS Tax Return Transcript OR** a signed copy of my 2023 IRS Tax Return (IRS Form 1040 and, if applicable, schedules 1, 2, and 3)
- o Check here if an IRS Tax Return Transcript(s) or copy of your IRS Tax Return is attached to this worksheet.
- ☐ Not required to file a 2023 IRS tax return and I completed and attached the **Coe College Non-Tax Filer Certification Form** (enclosed).

Get Tax Transcript by Mail - Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript."

Get Tax Transcript Online - Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript."

Automated Telephone Request - 1-800-908-9946.

Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T.

Certification and Signatures

Each person signing below certifies that all of the information reported is complete and correct and grants the Student Financial Services Office permission to update the FAFSA to match the values found on this and other verification documents that may be provided. **Please note that typed signatures will not be accepted.**

Student's Handwritten Signature

Date

Spouse's Handwritten Signature (if applicable)

Date

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Mail: Coe College Office of Student Financial Services, 1220 First Ave NE, Cedar Rapids, IA 52402
Fax: 319.399.8886 Upload Portal: my.coe>student tab>financial document upload (available to enrolled students)