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Section D: Untaxed Distributions – IRAs, Pensions, Annuities (2024 IRS Form 1040, Lines 4a and 5a minus 4b and 5b)

Student (If applicable)	Parent (Both parents, if taxes are filed jointly)	Parent Spouse or Partner (If taxes are filed separately)
<input type="checkbox"/> No IRA, Pension, Annuity Rollover	<input type="checkbox"/> No IRA, Pension, Annuity Rollover	<input type="checkbox"/> No IRA, Pension, Annuity Rollover
<input type="checkbox"/> Yes, IRA, Pension, Annuity Rollover IRA \$ _____ Pension/ Annuities \$ _____	<input type="checkbox"/> Yes, IRA, Pension, Annuity Rollover IRA \$ _____ Pension / Annuities \$ _____	<input type="checkbox"/> Yes, IRA, Pension, Annuity Rollover IRA \$ _____ Pension/ Annuities \$ _____

Section E: Student Tax Filing Information for 2024

Student must complete this section

- Student filed a 2024 tax return. Submit one of the following types of tax documentation and continue to parental information in section F.
 - Use Direct Data Exchange already provided on the 2026-2027 FAFSA
 - Send a copy of the 2024 Federal IRS Tax Return Transcript
 - Send hand-signed, 2-page copy of Federal IRS Form 1040 Tax Return; include schedules 1 & 3
- The student did not file **AND was not required** to file a 2024 income tax return with the IRS.
NOTE: By completing this document, you certify that you have not filed and are not required to file a 2024 income tax return, and have listed all income earned from work, other income, and resources for the 2024 tax year. Non-tax filers must check and complete the following box(es) that apply.

- Student was not employed and had no income earned from work in 2024.
- Student was employed in 2024 but did not file a tax return. List all employers and the amount earned from each employer in 2024. **Include a copy of the IRS W-2 form or equivalent document.** List every employer, even if they did not issue a W-2.

Employer's Name	IRS W-2 or an Equivalent Provided?	Annual Amount Earned in 2024
Total Amount of Income Earned from Work		\$

- Student had other income and resources for support during the 2024 tax year but did not file a tax return. List each source of income and the annual amount received in 2024.

Source of Income	Annual Amount in 2024
Total Amount of Income	\$

Student 2024 Income

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Section F: Parent(s) Tax Filing Information for 2024

Parent(s) must complete this section

Parent 2024 Income

Parent filed a 2024 tax return. Submit one of the following types of tax documentation. Move to Other Parent Questions.

- Use Direct Data Exchange already provided on the 2026-2027 FAFSA
- Send a copy of the 2024 Federal IRS Tax Return Transcript
- Send hand-signed, 2-page copy of Federal IRS Form 1040 Tax Return; include schedules 1 & 3

The Parent did not file AND **was not required** to file a 2024 income tax return with the IRS.
 NOTE: By completing this document, you certify that you have not filed and are not required to file a 2024 income tax return, and have listed all income earned from work, other income, and resources for the 2024 tax year. Non-tax filers must check and complete the following box(es) that apply.

Parent was not employed and had no income earned from work in 2024.

Parent was employed in 2024 but did not file a tax return. List all employers and the amount earned from each employer in 2024. **Include a copy of the IRS W-2 form or equivalent document.** List every employer, even if they did not issue a W-2.

Employer's Name	IRS W-2 or an Equivalent Provided?	Annual Amount Earned in 2024
Total Amount of Income Earned from Work		\$

Parent had other income and resources for support during the 2024 tax year but did not file a tax return. List each source of income and annual amount received in 2024.

Source of Income	Annual Amount in 2024
Total Amount of Income	\$

Parent Spouse or Partner 2024 Income

There is no other parent or stepparent in the household.

Parent Spouse or Partner (Parent 2) filed a 2024 tax return. Submit one of the following types of tax documentation.

- Use Direct Data Exchange already provided on the 2026-2027 FAFSA.
- Send a copy of the 2024 Federal IRS Tax Return Transcript.
- Send hand-signed, 2-page copy of Federal IRS Form 1040 Tax Return; include schedules 1 & 3.

Parent Spouse of Partner (Parent 2) did not file AND **was not required** to file a 2024 income tax return with the IRS.
 NOTE: By completing this document, you certify that you have not filed and are not required to file a 2024 income tax return, and have listed all income earned from work, other income, and resources for the 2024 tax year. Non-tax filers must check and complete the following box(es) that apply.

Parent Spouse or Partner (Parent 2) was not employed and had no income earned from work in 2024.

Parent Spouse or Partner (Parent 2) was employed in 2024 but did not file a tax return. List all employers and the amount earned from each employer in 2024. **Include a copy of the IRS W-2 form or equivalent document.** List every employer, even if they did not issue a W-2.

Employer's Name	IRS W-2 or an Equivalent Provided?	Annual Amount Earned in 2024
Total Amount of Income Earned from Work		\$

Parent Spouse of Partner (Parent 2) had other income and resources for support during the 2024 tax year but did not file a tax return. List each source of income and the annual amount received in 2024.

Source of Income	Annual Amount in 2024
Total Amount of Income	\$

Tips for Completing the Verification Worksheet

Verification is a process required by the U.S. Department of Education to confirm that the information reported on the FAFSA is accurate. The U.S. Department of Education randomly selects students for this process. The Office of Financial Aid begins verifying FAFSA information after receiving all requested forms and documentation.

See the Verification Worksheet for the corresponding sections B, D, E and F below.

Section B. Legal parent(s) for the FAFSA as defined by the U.S. Department of Education

Legal parent for the FAFSA includes biological parent(s), stepparent, and adoptive parents. For the FAFSA, grandparents, foster parents, legal guardians, legal custodians, brothers, sisters, aunts, uncles, and widowed stepparents are not legal parents unless they have legally adopted the student.

Marital Status of student's parent(s)	Information required by the U.S. Department of Education
Married	Both of your parents (includes biological, step-parent, or legal adoptive parents)
Unmarried, but biological parents live together	Both of your legal parents
Remarried (previously divorced/widowed)	Legal parent and stepparent
Divorced or Separated	Provide information about the parent who provided more financial support during the last 12 months. If both parents provided an exact equal amount of financial support or if they don't support you financially, provide information for the parent with the greater income and assets.
Widowed	Legal parent only (unless remarried)
Single (never married)	Provide information about the parent who provided more financial support during the last 12 months. If both parents provided an exact equal amount of financial support or if they don't support you financially, provide information for the parent with the greater income and assets.

Section B. Family Size:

- When determining if your parents provide more than half support for siblings or other persons, support includes housing, utilities, cell service, transportation, food, clothing, medical, childcare, and personal expenses.
- Do not include foster children for whom the parent(s) received a 50% or more subsidy.

Section D: Untaxed Distributions from IRAs, Pensions, Annuities

Untaxed IRA Distributions = 2024 IRS Tax Form 1040 (line 4a minus line 4b)

Untaxed Pensions and Annuities = 2024 IRS Tax Form 1040 (line 5a minus line 5b)

NOTE: If the student's and/or parent's tax return(s) show a **ROLLOVER** for all or part of the untaxed amount (calculated above), check the box for IRA/Pension Rollover on the Verification Worksheet and add the rolled over amount to the worksheet.

Section E & F: FAFSA Requirements for the Student and/or Parent(s) Who DID FILE a 2024 Tax Return

Provide official tax information → 3 options:

- 1.) Use the Direct Data Exchange (FADDX) on the FAFSA to transfer tax information
- 2.) Obtain the *IRS Tax Return Transcript for 2024 and submit a copy to Enrollment Services
- 3.) Submit a copy of the 2024 tax return, Form 1040, that was filed with the IRS
 - ✓ Requires taxpayer signature or signature/credentials of a tax professional who prepared the return
 - ✓ Must also submit copies of Schedules 1 and 3, if any of them were used for the tax return

Section E & F: FAFSA Requirements for the Student and/or Parent(s) Who DID NOT FILE a 2024 Tax Return

Student and/or Parent(s) who earned money from work in 2024 but did not file a tax return:

Sometimes wage earners do not earn enough to require them to file a tax return, or their income is not taxable.

For earnings from work → two steps:

- 1.) Must provide copies of all W-2s for 2024 (or the IRS Wage & Income Transcript)
- 2.) On the Verification Worksheet, list the names of all employers and amounts earned for 2024, even if the employer did not issue a W-2.

RESOURCES

*IRS Tax Transcripts Wage & Income Transcript	Get Transcript Online – Go to www.irs.gov , click "Get Your Tax Record." Click "Sign in to your online account." Make sure to request the "Return Transcript" and NOT the "Account Transcript." Follow the instructions to create an ID.me account if you do not already have one. If you need help creating an ID.me account or verifying your identity, visit the https://help.id.me/hc/en-us/articles/8214940302999-IRS-and-ID-me For other ways to obtain Transcripts, please visit our resource section on our Website.
Financial Aid Dashboard on Wings	Track verification status on student's Financial Aid Dashboard on WINGS. The student will be contacted if more information is needed.
Deadline and Processing Timeframes	https://www.wright.edu/enrollment-services/financial-aid/important-dates