



**2019-2020 RETURNING STUDENT - Dependent
FINANCIAL AID VERIFICATION and APPLICATION**

- Use this form if College of the Atlantic has notified you that you have been selected for verification.
- In order to be considered for both federal and institutional aid at College of the Atlantic you must complete this form AND the Free Application for Federal Student Aid (FAFSA) <http://fafsa.gov>. File your FAFSA beginning October 1st.
- If you were born AFTER January 1, 1993 you MUST complete PARENTAL information. If your parents are divorced, separated or never married and not living together, complete the PARENTAL information using the parent that you live with. If you do not live with a parent use parental information for the parent you lived with most recently. Be sure to include **step-parent information in the case of a remarriage**.
- If a question does not apply to you, put "N/A" or "0" in the answer space. **DO NOT LEAVE BLANK ANSWERS.**
- Return this application with a Tax Return Transcript (instructions included) of your 2017 federal income tax return no later than April, 1st to the Financial Aid Office.

1. STUDENT Name and Address (please print)

First	MI	Last
<hr/>		
Street or PO Box	City	State Zip
<hr/>		
Phone ()	Email	
<hr/>		
Date of Birth	Social Security Number or COA Student ID	
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2. STUDENT and PARENT Household Information

*If you were born AFTER January 1, 1993 and your parents are divorced, separated or never married and not living together, please have your 'other' parent fill out the COA Noncustodial Parent Information form and provide a copy of their 2017 tax transcript or a SIGNED copy of their tax return in order to be considered for **institutional funding***

Student's natural or adoptive parents are

- ☐ Married ☐ Separated* ☐ Divorced* ☐ Never married ☐ Never married and live together ☐ Widowed

*Date of separation/divorce _____ If divorced is this parent remarried? ☐ Yes ☐ No

First Name

Last Name

COA ID or SSN

Household Information

- Include yourself, your parent(s) and step-parent (if remarried) EVEN if you do not live with your parents.
- Siblings, step-siblings and other people if they now live with your parents, your parents provide more than half of their support and will continue to do so from July 1, 2019 and June 30, 2020.
- Identify the people in your parents' household who will be college students between July 1, 2019 and June 30, 2020. Do NOT include the college your parent(s) are attending.

Full Name	Age	Relationship to student	Name of <u>College or University</u> (if at least ½ time during 2019-2020)
1		<i>Self</i>	College of the Atlantic
2			
3			
4			
5			
6			

Do parents own the home in which they live? ☐ Yes ☐ No

If your natural or adoptive parents are divorced, separated or unmarried and not living together, provide the name of the parent who provides less than then 50% support to you.

Other parent's name _____ Age _____

Is this parent remarried? ☐ Yes ☐ No**3. DEPENDENT STUDENT Tax Transcript & Income Information - Year 2017**

Instructions: Check the box below that applies. You MUST provide the documentation requested.

☐ Used the IRS DRT in FAFSA on The Web (FOTW) to transfer 2017 IRS income tax return information into the FAFSA. *I will provide all W2s and/or 1099s.*

☐ Unable or chooses not to use the IRS DRT in FOTW, and instead will provide the school with a 2017 IRS Tax Return Transcript and all W2s and/or 1099s (see Additional Information and Instructions).

☐ Did not file a federal tax return in 2017 because:

☐ I had no income earned from work in 2017.

☐ Earned income but, according to IRS Publication 17, am not required to file an income tax return.

By signing below, I certify that I have not and am not required to file an income tax return.**

Student signature

Date

****Independent non-tax filers are REQUIRED to provide *IRS Verification of Non-filing Letter***



First Name

Last Name

COA ID or SSN

4. PARENT Tax Transcript & Income Information – Year 2017.

Instructions: Check the box below that applies. You MUST provide the documentation requested.

- ☐ Used the IRS DRT in **FAFSA on The Web (FOTW)** to transfer 2017 IRS income tax return information into the FAFSA. *I will provide all W-2s and/or 1099s.*
- ☐ Unable or chooses not to use the IRS DRT in FOTW, and instead will provide the school with a 2017 IRS Tax Return Transcript(s) and all W-2s and/or 1099s. (see Additional Information and Instructions.)
- ☐ Did not file a federal tax return in 2017. You must obtain the *IRS Verification of Non-filing Letter* indicating that you did not file and were not required to file. If you worked in 2017 you must provide copies of all W-2s or 1099s.

5. STUDENT and PARENT Other Income and Asset Information

Please refer to 2017 income information and the FAFSA. If you did not receive or do not have write '0' or NA

Other Income and Assets	ANNUAL AMOUNTS	
	Student	Parents
Payments to tax-deferred pension plans such as 401(K) or 403(B)	\$	\$
Deductible IRA/Keogh payments	\$	\$
Housing or living allowances paid to military, clergy and others (include cash value of benefits)	\$	\$
Child support received or paid (circle)	\$	\$
Money received, or paid on your behalf, include distributions to student from a 529 plan that is owned by someone other than you or your parents.	\$	\$
Tax exempt interest income (Line 8b on taxes)	\$	\$
Cash, checking and/or savings	\$	\$
Net worth means the current value, as of today, of investments, businesses, and/or investment farms, minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use 0 for investments or properties with a negative value.		
Net worth of INVESTMENTS – real estate (other than the home where you live) includes a unit within a family home that has its own entrance, kitchen, and bath and is rented to someone OTHER than a family member, trust funds, UGMA, UTMA, money market funds, mutual funds, CDs, stocks, stock options, bonds, other securities, installment and land sale contracts, commodities, education savings accounts	\$	\$
Net worth of BUSINESS and/or INVESTMENT FARM with at least 100 employees - 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.	\$	\$
Retirement Account Rollover – did you or your parent(s) report a rollover to a retirement account on your 2017 tax return – check ONLY if yes.	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes

6. Scholarships and other aid

Please list any expected financial assistance from other sources (faculty/staff tuition grants, outside scholarships, etc). List type of aid and amounts below. Include ANY and ALL scholarships that you have applied for *or plan to apply for* even if you have not received a response yet. You are legally responsible for reporting all outside scholarships to your school whether listed below or not. To maximize your benefits, report final scholarship information to COA by July 1 (please include copy of letter/check). Include any Veterans Benefits.

- | | |
|----|----|
| 1. | 4. |
| 2. | 5. |
| 3. | 6. |

7. Comments (attach additional pages if needed)

STUDENT and PARENT Certification and Signatures

Each person signing this worksheet certifies that all of the information reported is complete and correct. If asked, you will agree to provide information that will verify the accuracy of information provided. The secretary of education has the authority to verify information reported on the FAFSA with the IRS and other agencies. If you purposely give false or misleading information, you may be fined up to \$20,000, sent to prison or both.

Student's Signature _____ Date _____

Parent's Signature _____ Date _____

Remember to...

- List yourself and your parent(s) in Household Information
- Not leave any answers blank. Please fill them as requested. Use 'N/A' or '0' as necessary.
- Follow up and provide information about outside scholarships
- Provide a 2017 tax return transcript

ADDITIONAL INFORMATION AND INSTRUCTIONS



First Name

Last Name

COA ID or SSN

- WRITE YOUR NAME, SOCIAL SECURITY NUMBER and/or STUDENT ID on each page of this form along with any requested documents.
- The law says that, before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and/or a parent whose information was reported on the FAFSA must complete and sign this institutional verification document, attach any required documents, and submit the form and other required documents to us. We may ask for additional information. If you have questions about verification, **contact us as soon as possible so that your financial aid will not be delayed.**

IRS Tax Return Transcript AND Non-filing Letter may be obtained through:

- Get Transcript by MAIL – Go to www.irs.gov and click Get Your Tax Record, then click “Get Transcript by MAIL”. Input your information, click Continue, Select RETURN TRANSCRIPT for 2017.
- Get Transcript ONLINE – Go to www.irs.gov and click Get Your Tax Record, then click “Get Transcript ONLINE”. Sign Up or Log In then select RETURN TRANSCRIPT for 2017.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

Tax Filers

- Request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.”
- If you (and your spouse) or your parents filed separate IRS income tax returns, all **Tax Return Transcripts** must be provided.

Non-Filers

- Select “Verification of Non-filing Letter”

Amended Returns

- A **2017 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and**
- A signed copy of the 2017 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS

Return form, along with any requested documentation, to the Financial Aid Office:

College of the Atlantic 105 Eden Street Bar Harbor, ME 04609 Attn: Financial Aid	FAX 207-288- 2328	Email amcintire@coa.edu or dcassel@coa.edu	In person Admissions and Financial Aid Office Kaelber Hall
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Acronyms

FAFSA – Free Application for Federal Student Aid www.fafsa.gov

SSN – Social Security Number

W-2 or 1099 – Wage and/or earning statements

FOTW – FAFSA on The Web www.fafsa.gov

IRS – Internal Revenue Service www.irs.gov

FSA – Federal Student Aid www.fsa.ed.gov