



**2020-2021 RETURNING STUDENT Independent
FINANCIAL AID VERIFICATION and APPLICATION**

ONLY use this form if you were born before January 1, 1994
OR the Financial Aid Office has approved your request for a Dependency Override.

- 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 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 201* federal income tax return no later than 1st to the Financial Aid Office.

1. Name and Address (please print)

First _____ MI _____ Last _____

Street or PO Box _____ City _____ State _____ Zip _____

Phone (_____) _____ Email _____

Date of Birth _____ Social Security Number _____

Student's Marital Status: Single Married* Separated* Divorced* Widowed*

Household Information

- * Include yourself and your spouse (if married)
- * Your children if you provide more than 1/2 of their support and will continue to do so from July 1, 20XV and June 30, 20XW

Full Name	Age	Relationship to student	Name of College or University (if at least 1/2 time during 20XV)
1.		Self	College of the Atlantic
2.			
3.			
4.			
5.			

Do you own your home? Yes No

3. Tax Transcript & Income Information - Year 2017

Instructions: Check the box below that applies. You **MUST** provide the documents 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 the school with all of my (and my spouse's) W-2s or 1099s.

Unable or choose not to use the IRS DRT in **FOTW**, and instead will provide the school with a 2017 IRS Tax Return Transcript(s) along with all of my (and my spouse's) W-2s or 1099s.

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 (and your spouse) must provide all W-2s or 1099s.

4. Other Income and Asset Information

Please refer to 2017 income information and the FAFSA.

If you did not receive/have write '0' or No

Other Income and Assets	ANNUAL AMOUNTS
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)	\$
Tax exempt interest (Line 8b on taxes)	\$
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.	\$
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 in which you live) includes a unit within a family home that has its own entrance, kitchen, and bath and 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 report a rollover to a retirement account on your 2017 tax return – check ONLY if yes.	<input type="checkbox"/> Yes

First Name

Last Name

COA ID or SSN

5. 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. |

6. Comments (attach additional pages if needed)

Certification and Signatures

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 _____

Remember to...

- List yourself and your spouse (if married) and children in Part 2, 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 or Verification of Non-filing Letter

ADDITIONAL INFORMATION AND INSTRUCTIONS

- 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 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 lblack@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