



**C. Dependent *Student's* Income Information to Be Verified**

1. **TAX RETURN FILERS**—**Important Note:** If the student filed, or will file, an amended 2023 IRS tax return, the student must contact the Financial Aid Office before completing this section.

**Instructions:** Complete this section if the student filed or will file a 2023 income tax return with the IRS. *As part of federal student aid eligibility, students are 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. 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.*

If 2023 income tax return information for the student was not available or could not be used, the student must provide the institution with a 2023 IRS Tax Return Transcript(s) or a freshly signed copy of the 2023 federal income tax return and applicable schedules. To obtain an IRS tax return transcript, go to [www.irs.gov](http://www.irs.gov) and click on the “Get Your Tax Record” link, or call 1-800-908-9946. Make sure to request the “IRS tax return transcript” and **NOT** the “IRS tax account transcript.” You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2023 IRS tax return was filed).

- The student provided consent and approval to share and import income and tax information from the IRS to the FAFSA form. Additional income and tax information for the student is not required.
- The student income and tax information did not fully transmit from the IRS to the FAFSA form. Additional income and tax information for the student is required.

**Check the box that applies:**

- Check here if the student's 2023 IRS tax return transcript or freshly signed 2023 federal tax return is attached to this worksheet.
- Check here if the student's 2023 IRS tax return transcript or freshly signed 2023 federal tax return will be submitted to the institution later. Verification cannot be completed until the IRS tax return transcript or tax return has been submitted to Daemen.

\*If you choose to download your IRS tax return transcript as a PDF, you can upload the PDF file at [daemen.edu/finaidupload](http://daemen.edu/finaidupload)\*  
 \*\*Signed copies of 2023 federal tax returns must be either mailed or delivered in person to the Financial Aid Office. Uploaded and scanned copies **will not** be accepted.\*\*

2. **TAX RETURN NONFILERS**—Complete this section if the student will not file and is not required to file a 2023 income tax return with the IRS.

**Check the box that applies:**

- The student **was not** employed and had no income earned from work in 2023.
- The student **was** employed in 2023 and has listed below the names of all the student's employers, the amount earned from each employer in 2023, and whether an IRS W-2 form is attached. Attach copies of all 2023 IRS W-2 forms issued to the student by employers. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

| Employer's Name                        | 2023 Amount Earned         | IRS W-2 Attached?   |
|--|----------------------------|---------------------|
| <i>Suzy's Auto Body Shop (example)</i> | <i>\$2,000.00(example)</i> | <i>Yes(example)</i> |
|  |                            |                     |
|  |                            |                     |
|  |                            |                     |
|  |                            |                     |

DO NOT COMPLETE IF YOU FILED TAXES

**D. Parent's Income Information to Be Verified**—Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

1. **TAX RETURN FILERS**—**Important Note:** If the student's parent(s), filed or will file, an amended 2023 IRS tax return the student's Financial Aid Office must be contacted before completing this section.

**Instructions:** Complete this section if the student's parent(s) filed or will file a 2023 income tax return with the IRS. *As part of federal student aid eligibility, parents are 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. 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.*

If 2023 income tax return information for the parent(s) was not available or could not be used, the parent(s) must provide the institution with a 2023 IRS Tax Return Transcript(s) or a freshly signed copy of the 2023 federal income tax return and applicable schedules. To obtain an IRS tax return transcript, go to [www.irs.gov](http://www.irs.gov) and click on the "Get Your Tax Record" link, or call 1-800-908-9946. Make sure to request the "IRS tax return transcript" and **NOT** the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2023 IRS tax return was filed).

- Parent(s) provided consent and approval to share and import income and tax information from the IRS to the FAFSA form. Additional income and tax information for the parent is not required.
- Parent(s) income and tax information did not fully transmit from the IRS to the FAFSA form. Additional income and tax information for the parent is required.

**Check the box that applies:**

- Check here if the parent 2023 IRS tax return transcript or freshly signed 2023 federal tax return is attached to this worksheet.
- Check here if the parent 2023 IRS tax return transcript or freshly signed 2023 federal tax return will be submitted to the institution later. Verification cannot be completed until the IRS tax return transcript or tax return has been submitted to Daemen.

\*If you choose to download your IRS tax return transcript as a PDF, you can upload the PDF file at [daemen.edu/finaidupload](http://daemen.edu/finaidupload)\*  
 \*\*Signed copies of 2023 federal tax returns must be either mailed or delivered in person to the Financial Aid Office. Uploaded and scanned copies **will not** be accepted.\*\*

2. **TAX RETURN NONFILERS**—Complete this section if the student's parent(s) did not file and are not required to file a 2023 income tax return with the IRS.

**Check the box that applies:**

- Parent(s) **were not** employed and had no income earned from work in 2023.
- Parent(s) **were** employed in 2023 and has listed below the names of all the parent's employers, the amount earned from each employer in 2023, and whether an IRS W-2 form is attached. Attach copies of all 2023 IRS W-2 forms issued to the parent(s) by employer(s). *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

| Employer's Name                        | 2023 Amount Earned          | IRS W-2 Attached?    |
|--|-----------------------------|----------------------|
| <i>Suzy's Auto Body Shop (example)</i> | <i>\$2,000.00 (example)</i> | <i>Yes (example)</i> |
| DO NOT COMPLETE IF YOU FILED TAXES     |                             |                      |
|  |                             |                      |
|  |                             |                      |

## E. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent must sign and date.

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

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Date

*You should make a copy of this worksheet for your records.*

*Do not mail this worksheet to the U.S. Department of Education.*

### **Submit this worksheet to the Financial Aid Office**

#### **Via US Mail:**

Financial Aid Office  
Daemen University  
4380 Main Street  
Amherst, NY 14226

#### **In person:**

Financial Aid Office, room 111 Duns Scotus building

#### **Secure Upload:**

[daemen.edu/finaidupload](http://daemen.edu/finaidupload)

Please do not send sensitive documents through email.