

Financial Verification
TRiO SSS STEM ASEMS
The University of Arizona

STUDENT LAST NAME:	FIRST:	MI:
EMAIL:		SID:

Why do we ask for financial documentation?

According to federal policy (Higher Education Act(e)(1)), SSS/TRiO must provide documentation of a student's eligibility for the program to the U.S. Department of Education and implement the grant regulations that state two-thirds of the students served must meet federal first-generation and low- income guidelines. We even ask for financial documentation from students who believe or know they do not qualify as low- income.

Why send in your parent's tax information?

Parent tax information and signature(s) are needed if the student can still be claimed as a dependent according to Federal Financial Aid law. A student is ONLY CONSIDERED INDEPENDENT according to Federal Financial Aid if they meet one of the following criteria:

- Is 24 years old or older by December 31 of the award year;
- Is married;
- Has legal dependent(s), other than their spouse;
- Is a veteran of the Armed Forces of the United States;
- Is an orphan or ward of the State of Arizona or a ward of his/her residential State;
- Has received a dependency override through the University of Arizona's Office of Student Financial Aid.

What forms of financial verification are accepted?

The information we require is the number of exemptions on the tax return form and the amount of TAXABLE income. In accordance with federal guidelines, we will accept any of the following forms as financial verification: Option 1 or Option 2 as described on the next page.

If you have any questions, feel free to contact Alexandra Diaz, TRIO SSS STEM Director at alexandra@email.arizona.edu.

OPTION 1: If you filed taxes—please complete option 1.

***If you did not file taxes, Write "N/A" in these slots below for option 1 where our form is asking for information since it's not applicable, and move on to fill out Option 2 below.**

Self-Certification Statement--All information can be found on your **2020 or 2021** tax return form.

<i>Tax Year</i>	<i>Tax Form</i>	<i>TAXABLE income can be found on:</i>
2020	1040	Line 11B
2021	1040	Line 15

Completed by student's parent/guardian **UNLESS** the student has been deemed independent by the Office of Student Financial Aid.

According to my _____ (write in tax year- 2020 or 2021) tax return form:

- **The number of people in our household** is _____
- Our **TAXABLE income** is \$ _____.

OPTION 2: If you did not file taxes, please complete the section below.

If you did file taxes, fill out Option 1 above with the information we are requesting, and write "N/A" in these slots below for option 2 since it's not applicable.

Self-Certification Statement—let us know which of the following years you are

Completed by student's parent/guardian.

Note: Taxable income is not the same as adjusted gross income or net income. Taxable income is the portion of your total income that can be taxed based on your adjusted gross income.

To the best of my knowledge, our family's taxable income for _____ (write in tax year--2020 or 2021) was \$ _____, and the **number of people** (self, spouse, children) in our household is _____.

Parent/Guardian Signature: _____

Date: _____