



## B. Student's Income Information to be Verified

Did the student (and spouse) file, will file, or is required to file an income tax return? If YES, Answer #1, ; If NO, Answer #2

### 1. TAX RETURN FILERS

**Instructions:** Complete this section if the student filed, will file or is required to file a 2016 tax return. The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of the FAFSA application.

**California Dream Act students – There is no IRS DRT within the application. You must submit a tax return transcripts from the IRS.** If you and your spouse filed separate returns, you must submit both tax return transcripts. In most cases, no further documentation is needed to verify 2016 income information.

**Check the box that applies:**

- The student has used the IRS DRT** to transfer 2016 IRS income tax return information into their FAFSA.

If the student is unable to use the IRS DRT, a **Tax Return Transcripts from the IRS** must be submitted. To obtain a 2016 IRS Tax Return Transcript, go to [www.IRS.gov/Individuals/Get-Transcript](http://www.IRS.gov/Individuals/Get-Transcript). To use **Get Transcript Online**, you must have a Social Security number (SSN) and immediate access to your email account to confirm your email address. Then you'll need to answer personal, financial and tax related question to verify your identity. To use **Get Transcript by Mail**, you need your SSN or an Individual Tax Identification Number (ITIN), date of birth, and address from your latest tax return. You may also call (800) 908-9946 and follow the prompt to have a Tax Return Transcript mailed to you.

- The student (and spouse) has attached 2016 IRS Tax Return Transcript(s).**

### 2. TAX RETURN NONFILER

**Instructions:** Complete this section if the student will not file and is not required to file a 2016 IRS income tax return.

**Check the box that applies:**

- The student was not employed and had no income earned from work in 2016.**

If the student did not live with parent(s), how did student support themselves in 2016?

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- The student was employed in 2016 and has listed below all employers**, the amount earned from each and whether an IRS W-2 form is attached. Attached copies of all 2016 W-2 forms issued to the student by employers. *List every employer even if they did not issue an IRS W-2 form.*

Employer's Name	2016 Amount Earned	W-2 attached?
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No

Note: We may require you to provide documentation from the IRS that indicates a 2016 IRS income tax return was not filed with the IRS.

### 3. ASSET INFORMATION

As of today, what the student's (and spouse's) total current balance of cash, savings and checking accounts? Don't include student financial aid.

\$ \_\_\_\_\_

As of today, what is the net worth of Student's (and spouse's) investment, including real estate? Don't include the home the student lives in.

\$ \_\_\_\_\_

As of today, what is the net worth of Student's (and spouse's) current businesses and/or investment farms? Don't include a family farm or family business with 100 or fewer full-time or fill-time equivalent employees.

\$ \_\_\_\_\_

## C. Parent's Income information to be Verified

Did the parent(s) file, will file, or is required to file an income tax return? If YES, Answer #1 ; If NO, Answer #2

### 4. TAX RETURN FILERS

**Instructions:** Complete this section if the student filed, will file or is required to file a 2016 tax return. The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of the FAFSA application.

**California Dream Act students – There is no IRS DRT within the application. Parent(s) must submit a tax return transcripts from the IRS.** In most cases, no further documentation is needed to verify 2016 income information.

Check the box that applies:

- The parent(s) has used the IRS DRT** to transfer 2016 IRS income tax return information into the student's FAFSA. If the parent(s) is unable to use the IRS DRT, a **Tax Return Transcripts from the IRS** must be submitted. To obtain a 2016 IRS Tax Return Transcript, go to [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript). To use **Get Transcript Online**, you must have a Social Security number (SSN) and immediate access to your email account to confirm your email address. Then you'll need to answer personal, financial and tax related question to verify your identity. To use **Get Transcript by Mail**, you need your SSN or an Individual Tax Identification Number (ITIN), date of birth, and address from your latest tax return. You may also call (800) 908-9946 and follow the prompt to have a Tax Return Transcript mailed to you. **If parents filed separately, they are unable to use the IRS DRT and they must submit both tax return transcripts.**

- The parent(s) has attached 2016 IRS Tax Return Transcript(s).**

### 5. TAX RETURN NONFILER

**Instructions:** Complete this section if the parent(s) will not file and is not required to file a 2016 IRS income tax return.

Check the box that applies:

- The parent(s) were not employed and had no income earned from work in 2016.**

How did the parent(s) support themselves and their family in 2016?

\_\_\_\_\_

- The parent(s) were employed in 2016 and has listed below all employers**, the amount earned from each and whether an IRS W-2 form is attached. Attached copies of all 2016 W-2 forms issued to the parent(s) by employers. *List every employer even if they did not issue an IRS W-2 form.*

Employer's Name	2016 Amount Earned	W-2 attached?	
		<input type="checkbox"/> Yes	<input type="checkbox"/> No
		<input type="checkbox"/> Yes	<input type="checkbox"/> No
		<input type="checkbox"/> Yes	<input type="checkbox"/> No

Note: We may require you to provide documentation from the IRS that indicates a 2016 IRS income tax return was not filed with the IRS.

### 6. ASSET INFORMATION

As of today, what the parent(s) total current balance of cash, savings and checking accounts? Don't include student financial aid. \$ \_\_\_\_\_

As of today, what is the net worth of parent(s) investment, including real estate? Don't include the home the parent live. Net worth meant current value minus debt. \$ \_\_\_\_\_

As of today, what is the net worth of parent(s) current businesses and/or investment farms? Don't include a family farm or family business with 100 or fewer full-time or fill-time equivalent employees. \$ \_\_\_\_\_

**D. Documentation of Identity / Statement of Educational Purpose**

In order to complete the verification process, you (the student) will need to appear **IN PERSON** at Long Beach City College and present your valid government-issued photo ID (such as a state ID, driver’s license, military ID, U.S. passport, etc.) and this verification worksheet to a Financial Aid Specialist. The student will sign the statement below in front of the specialist who will validate it at the time of submission by signing and dating the form and making a copy of your photo ID.

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this *Statement of Educational Purpose* and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Long Beach City College for 2018-2019.

\_\_\_\_\_  
Student's Signature and Date

\_\_\_\_\_  
Financial Aid Specialist's Signature and Date

**If you cannot appear in person to submit this worksheet, you will need to provide a copy of your valid government-issued photo ID and this worksheet notarized by a public notary.**

**Notary’s Certificate of Knowledge – Notary Witness Only for Students Unable to Appear at LBCC in person**

State of \_\_\_\_\_ City/County of \_\_\_\_\_ On \_\_\_\_\_,  
before me \_\_\_\_\_, personally appeared \_\_\_\_\_,  
and proved to me on the basis of satisfactory evidence of identification \_\_\_\_\_  
to be the above-named person who signed the foregoing instrument.

**WITNESS my hand and official seal**

\_\_\_\_\_  
Notary Signature

\_\_\_\_\_  
Date Commission Expires

**OFFICIAL SEAL:**

## E. High School Completion Status

You must submit documentation of high school completion or an equivalent along with this worksheet. Check the one box that applies to you. Please note the supporting documentation required for each option.

**High School Diploma or High School Transcript including graduation date**

Please submit one of the following along with this form in person:

- (a) A copy of the student's high school diploma.
- (b) A copy of the student's final official high school transcript that shows the date when the diploma was awarded.

**NOTE:** In cases where a copy of a student's high school diploma or final official high school transcript is unavailable, e.g., the school is closed or located in a foreign country or the records are not available, an institution may accept alternative documentation to verify the student's high school completion status.

**Recognized Equivalent of a High School Diploma**

Please submit one of the following along with this form in person:

- (a) A copy of the student's General Educational Development (GED) certificate.
- (b) A California High School Proficiency Exam (not CAHSEE) certificate.
- (c) An academic transcript that indicates the student has successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- (d) For a person who has not completed high school but has excelled academically in high school, documentation on official school letterhead from the high school that the student excelled academically in high school.

**Homeschool**

Please submit one of the following along with this form in person:

- (a) A transcript or the equivalent, signed by the student's parent or guardian that lists the secondary school courses the student completed and documents the successful completion of a secondary school education.
- (b) A copy of the secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent) provided for under California law.

## F. Certification and Signature

By signing this worksheet, you certify that all of the information you provided is true and complete to the best of your knowledge. **Warning: 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

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date

For more information about the financial aid programs at LBCC, visit our web site at: <https://www.lbcc.edu/financial-aid>