



2026-2027 Dependent Verification 5 Worksheet Federal Student Aid Programs

Your application was selected by the U.S. Dept. of Education for review process called “verification.” In this process, we are required by federal law to verify information provided on the Free Application for Federal Student Aid (FAFSA). To verify this information, the IRS Tax Return Transcript is required.

We cannot process your financial aid until verification has been completed.

Instructions: Complete this section if you filed or will file a 2024 IRS income tax return(s). As part of federal student aid eligibility, you will be 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 2024 income information that was transferred into the student’s FAFSA using income and tax information directly from the IRS.

If 2024 income tax return information for you is not available or could not be used, you should provide the institution with a 2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return and applicable schedules.

A 2024 IRS Tax Return Transcript may be obtained through:

- Get Transcript by Mail – Go to www.irs.gov, click "Get Your Tax Record." Click “Get Transcript by Mail.” Make sure to request the “Return Transcript” and NOT the “Account Transcript.” The transcript is generally received within 10 business days from the IRS’s receipt of the online request.
- Get Transcript Online – Go to www.irs.gov, click "Get Your Tax Record." Click “Get Transcript Online.” Make sure to request the “Return Transcript” and NOT the “Account Transcript.” To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user’s name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS’s two-step authentication.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS’s receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS’s receipt of the paper request form.

Section A: Student Information

Last Name	First Name	Middle Initial
Mailing Address	City, State, Zip	Cadet ID #

Section B: Family Size (please complete chart below)

List ALL people in your household as part of your family size. Family Size Includes the following:

- The student (yourself)
- The student’s parents, even if the student is not living with them. Exclude a parent who has died or is not living in the household because of separation or divorce. Include a parent who is on active duty in the U.S. Armed Forces apart from the family.
- The student’s siblings if the following are true:
 - They live with the student’s parents (or live apart because of college enrollment or similar),
 - They receive more than half of their support from the student’s parents, and
 - They will continue to receive more than half their support from the student’s parents during the award year
- Other persons if the following are true:
 - They live with the student’s parents,
 - They receive more than half of their support from the student’s parents, and
 - They will continue to receive more than half of their support from the student's parents during the award year.

The provided criteria for “dependent children” or “other persons” align with the requirement that family size align with whom the parent could claim as a dependent on a U.S. tax return if you were to file a U.S tax return at the time of completing the 2026-2027 FAFSA. As a result, you should not include any unborn children in the family size. If more space is needed, provide a separate page with the student’s name and ID number at the top.

Full Name (Example: John Smith)	Age (16)	Relationship (Brother)
		Self

Section C: Tax Filers Only

The use of the FADDX is required to be eligible for federal student aid and institutional aid. All contributors on the FAFSA must provide consent to allow the IRS to share all necessary tax information with the FAFSA.

- Click here if you/or your parent(s) taxes are not required because IRS tax data was shared with Federal Student Aid via the Direct Data Exchange (FA-DDX).
- Click here if you/or your parent(s) taxes are required because IRS tax data was NOT shared with Federal Student Aid via the Direct Data Exchange (FA-DDX). If you check this box, please provide your 2024 Tax Return Transcript.

Section D: Non-Tax Filers Only

Non-tax filers must still provide consent on the FAFSA form. Failure to do so will result in being ineligible for federal student aid and institutional aid. Please also complete the following:

STUDENT TAX FORMS AND INCOME INFORMATION

1. Did the student file or will file a 2024 Federal Tax Return?

- Yes
- No, if no, please answer question 2.

2. Tax Return Non-filers – complete this section if the student will not file and is not required to file a 2024 Federal Tax Return with the IRS – check the box that applies:

- The student was not employed and had no income earned from work in 2024.
- The student was employed in 2024 and has listed the names of all their employers and the amount earned from each employer in 2024 below. List every employer even if they did not issue a W-2 form. If the student did not receive a W-2, submit a signed statement verifying where the student was employed in 024 and the total amount of income earned.

PARENT TAX FORMS AND INCOME INFORMATION

1. Did the parent(s) file or will file a 2024 Federal Tax Return?

Yes

No, if no, please answer question 2.

2. Tax Return Non-filers – complete this section if the parent(s) will not file and is not required to file a 2024 Federal Tax Return with the IRS – check the box that applies:

Neither parent was employed and had no income earned from work in 2024.

The parent(s) was employed in 2024 and has listed the names of all their employers and the amount earned from each employer in 2024 below. List every employer even if they did not issue a W-2 form. If the parent(s) did not receive a W-2, submit a signed statement verifying where the parent(s) was employed in 024 and the total amount of income earned.

Employer's Name	Parent Annual Amount Earned in 2024	IRS W-2 or Equivalent Document Provided

Section E: Additional Income Information

Please list any additional income information received in 2024.

(ENTER ZEROS IF NO FUNDS WERE RECEIVED)

<u>STUDENT</u>		TAX YEAR 2024
\$	Income earned from work (Line 1z plus Schedule 1: Lines 3 + 6)	

	Untaxed portions of Individual Retirement Account (IRA) Distributions and Pensions 2024 IRS Form 1040 Lines (4a minus 4b), (Line 5a minus 5b) (If negative, enter zero. Rollover amount if reported on FAFSA)
	Untaxed portions of pension and annuity distributions (withdrawals) (Rollover amount if reported on FAFSA)
	IRA deductions and Payments 2024 IRS Schedule 1 Line 16 + Line 20
\$	Tax exempt interest income from 2024 IRS Form 1040 Line 2a
\$	Education Tax Credits 2024 IRS (Schedule 3: Line 3 + 1040 Line 29)
\$	Foreign Earned Income Exclusion (foreign income exempt from federal taxation (if reported on FAFSA) (Schedule 1: Line 8d)

PARENT(S)		TAX YEAR 2024	
\$		Income earned from work (Line 1z plus Schedule 1: Lines 3 + 6)	
		Untaxed portions of Individual Retirement Account (IRA) Distributions and Pensions 2024 IRS Form 1040 Lines (4a minus 4b), (Line 5a minus 5b) (If negative, enter zero. Rollover amount if reported on FAFSA)	
		Untaxed portions of pension and annuity distributions (withdrawals) (Rollover amount if reported on FAFSA)	
		IRA deductions and Payments 2024 IRS Schedule 1 Line 16 + Line 20	
\$		Tax exempt interest income from 2024 IRS Form 1040 Line 2a	
\$		Education Tax Credits 2024 IRS (Schedule 3: Line 3 + 1040 Line 29)	
\$		Foreign Earned Income Exclusion (foreign income exempt from federal taxation (if reported on FAFSA) (Schedule 1: Line 8d)	

Section E: Identify Verification: You may choose option 1 or 2:

Option 1:

The student must appear in person at **The Virginia Military Institute** to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to:

- a driver's license
- other state-issued ID
- passport

The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

Option 2:

If the student is unable to appear in person at **The Virginia Military Institute** to verify his or her identity, the student must provide to the institution:

(a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and the completed notary acknowledgment below:

Notary's Certificate of Acknowledgement	
State of _____	
City/County of _____	
On _____,	before me, _____,
(Date)	(Notary's name)
personally appeared, _____, and proved to me	
(Printed name of signer)	
because of satisfactory evidence of identification _____	
(Type of unexpired government-issued photo ID provided)	
to be the above-named person who signed the foregoing instrument.	
WITNESS my hand and official seal	
(seal)	_____
	(Notary signature)
My commission expires on _____	
(Date)	

Section G: Signature

By signing this worksheet, I certify that all the information reported on this worksheet is complete and correct. If dependent, at least one parent must sign. Warning: If you purposely give false or misleading information on this worksheet, you may be fined, be sent to prison, or both. By signing, we also authorize VMI to make changes to my 2026/27 FAFSA based on documents and/or information we may have provided.

Student's Signature

Date

Parent(s) Signature

Date

Return to: VMI Financial Aid Office, 307B Letcher Avenue, Lexington, VA 24450
Office Number (540)-464-7208; FAX (540)-464-7629