



2026-2027 Verification Worksheet Independent Student

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Your application was selected for review in a process called “Verification.” In this process, Montana Technological University will be comparing information from your application with your educational records (if necessary), as well as your and your parents’ financial documents. The law states we have the right to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, Montana Technological University will make corrections electronically and notify you in writing. Please complete this form and submit it, in original form, to the Montana Technological University Financial Aid Office as soon as possible to avoid financial aid delays.

Montana Tech must review the requested information under the financial aid program rules (34 CFR, Part 668)

Student Name:	Student ID:
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Table 1: Student Name and ID

Section 1: Number of Household Members

Number of Household Members: List in the space below the people in your household including:

- Yourself (the student),
- your spouse, if married
- your or your spouse’s children if (a) they live with you (or live apart because of college enrollment), (b) you provide more than half of their support and (c) you will continue to provide more than half of their support from July 1, 2026 through June 30, 2027, and
- other people if they now live with you and you or your spouse provide more than half of their support and will continue to provide more than half of their support through June 30, 2027.

The provided criteria for “dependent children” or “other person” align with the requirement that family size align with whom the student could claim as a dependent on US tax return, if the student were to file a US tax return at the time of completing the 2026-27 FAFSA. As a result, the student should not include any unborn children in the family size.

Full Name	Age (as of 1/1/2026)	Relationship to Student
		<i>Self</i>

Table 2: Number of Household Members

If more space is needed, provide a separate page with the student’s name and ID number at the top.

Section 2: Verification of Student 2024 Income and Tax Information

Please notify the financial aid office if you or your spouse filed separate IRS income tax returns for 2024 or had a change in marital status since January 1, 2025.

Student , check one box in the left column below, then complete the section to the right of the selected box:			
<input type="checkbox"/> Filed a 2024 Federal IRS Tax Return, Puerto Rican, or foreign tax return	<input type="checkbox"/> You used the IRS direct data exchange in the FAFSA to submit your tax return information. OR <input type="checkbox"/> If you did not or cannot use the direct data exchange on the FAFSA, you must submit a 2024 IRS Tax Return Transcript or a signed copy of your 2024 Federal IRS Tax Return.		
<input type="checkbox"/> Had zero income in 2024 and are not required to file a 2024 Federal IRS Tax Return	Proceed to Section 3.		
<input type="checkbox"/> Had income in 2024 but are not required to file a 2024 Federal IRS Tax Return	<input type="checkbox"/> Complete the information below and <input type="checkbox"/> Attach copies of all 2024 W-2s.		
	Sources/Employer Name	2024 Income Earned	W-2 Attached
			<input type="checkbox"/>
			<input type="checkbox"/>

Table 3: Verification of Student 2024 Income and Tax Information

Section 3: Verification of Spouse 2024 Income and Tax Information

Spouse (Contributor) , check one box in the left column below, then complete the section to the right:			
<input type="checkbox"/> Filed a 2024 Federal IRS Tax Return, Puerto Rican, or foreign tax return	<input type="checkbox"/> You used the IRS direct data exchange in the FAFSA to submit your tax return information. OR <input type="checkbox"/> If you did not or cannot use the direct data exchange on the FAFSA, you must submit a 2024 IRS Tax Return Transcript or a signed copy of your 2024 Federal IRS Tax Return.		
<input type="checkbox"/> Had no income in 2024 and not required to file a 2024 Federal IRS Tax Return	<input type="checkbox"/> Submit a 2024 IRS Verification of Non-Filing Letter.		
<input type="checkbox"/> Had income in 2024 but not required to file a 2024 Federal IRS Tax Return	<input type="checkbox"/> Submit a 2024 IRS Verification of Non-Filing Letter, <input type="checkbox"/> Complete the information below, and <input type="checkbox"/> Attach copies of all 2024 W-2s.		
	Sources/Employer Name	2024 Income Earned	W-2 Attached
			<input type="checkbox"/>
			<input type="checkbox"/>

Table 4: Verification of Parent (Contributor) 2024 Income and Tax Information

By signing this form, I affirm that all information on this form and on any attachments is complete and accurate to the best of my knowledge. If requested, I agree to provide documentation to support the information I have provided on this form. I understand that any false statements or misrepresentation may be cause for denial, reduction, withdrawal, and/or repayment of financial aid and I may be subject to a fine, imprisonment or both, under provisions of the United States Criminal Code.

Student Signature (Required)

Date

Spouse Signature (Optional)

Date