

**Step 1 – Student Information**

Last name	First name	M.I.	WFU Student ID #
Address (include apt. no.)			Date of Birth (mmddyyyy)
City	State	Zip Code	Phone number (with area code)

**Step 2 – Household Information**

In the chart below include the **Full Name, Age, and Relationship** of:

- **Self**
- The parent with whom you lived most during the past year (primary residential parent) and step-parent.
  - Do not include your secondary household parent, if any.
  - Your primary residential parent’s other children if your primary residential parent will provide more than half of their support from July 1, 2018, through June 30, 2019 or if the other children would be required to provide parental information for completing a FAFSA for 2018-2019.
- **Other people** only if they now live with your primary residential parent and your parent will provide more than half of their support from July 1, 2018, through June 30, 2019.

List all members of your household below, based on the definitions above. Include the **Name of College, Undergraduate/Graduate Level, and Half-Time/Full-Time** status for those **siblings** attending at least half-time during 2018-2019 in a program leading to a degree, diploma, or certificate. List all household members, but include college information for siblings only.

Full Name	Age	Relationship	Name Of College (include sibling(s) if enrolled)	Undergraduate/ Graduate Level	Half-Time/ Full-Time
		Self	Wake Forest University	Undergraduate	

**Step 3 – Student’s Tax Filing Status – Calendar Year 2016**

Have you or will you be required to file a 2016 U.S. federal income tax return?

- YES** Continue to Step 4.  
 **NO** Complete *Student Non-Tax Filer's Statement*. Continue to Step 4.

**Step 4 –Parent(s)’ Tax Filing Status – Calendar Year 2016**

Have your parent(s) filed or will they be required to file a 2016 U.S. federal income tax return?

- YES**  
 **NO** Complete *Parent Non-Tax Filer's Statement*.

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2016 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Check the box(s) that applies:

\_\_\_\_\_ The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2016 IRS income tax return information into the student's FAFSA.

\_\_\_\_\_ The parents have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2016 IRS income tax return information into the student's FAFSA.

\_\_\_\_\_ The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2016 IRS Tax Return Transcript(s)**.

\_\_\_\_\_ Since the parents filed separate 2016 IRS income tax returns, the IRS DRT cannot be used. The 2016 IRS Tax Return Transcript(s) will be provided for each.

\_\_\_\_\_ The student has used the IRS DRT in *FAFSA on the Web* to transfer 2016 IRS income tax return information into the student's FAFSA.

\_\_\_\_\_ The student is unable or chooses not to use the IRS Data Retrieval Tool and will provide a 2016 IRS Tax Return Transcript.

CERTIFICATION: 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.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date

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