

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 (Including all household members, whether or not they are enrolled in college.)

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, 2019, through June 30, 2020 or if the other children would be required to provide parental information for completing a FAFSA for 2019-2020.
- **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, 2019, through June 30, 2020.

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 2019-2020 in a program leading to a degree, diploma, or certificate. List all household members, but include college information for siblings only.

Full Name of Household Member	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 2017

Have you or will you be required to file a 2017 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 2017

Have your parent(s) filed or will they be required to file a 2017 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 2017 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 2017 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 2017 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 **2017 IRS Tax Return Transcript(s)**.
- Since the parents filed separate 2017 IRS income tax returns, the IRS DRT cannot be used. The 2017 IRS Tax Return Transcript(s) will be provided for each.
- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2017 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 2017 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