



2019-20 Verification of Taxed and Untaxed Income and Assets

You have been selected by the UC Santa Cruz Financial Aid and Scholarship Office for a process called “verification”. In this process, we will compare information you provided on the financial aid application with information you provide in this packet. If necessary, we will make corrections and update your application. If you submit documents after the due date, you may be ineligible for institutional aid programs.

Due Date: June 2, 2019 postmark (July 1 for Transfers)

Submit the completed and **signed** forms to:

UC Santa Cruz
Financial Aid and Scholarship Office
205 Hahn Student Services Building
1156 High Street
Santa Cruz, CA 95064

If you send documents, please mail **copies** and do not send originals. If you have questions about the information contained in this packet, please contact us at 831-459-2963.

Please be advised that due to FERPA laws, our office will only speak with third parties (including parents) if authorized on the “Authorization to Release Information” form provided directly to UCSC students.

TAX INFORMATION

Use the checklist below before mailing your information to avoid delays:

- Attached **copies** of my parent/s and student’s 2017 tax transcript—as well as copies of all 2017 W-2 and/or 1099 forms. To obtain a copy of your tax transcript and W-2s from the IRS website, go to irs.gov/Individuals/Get-Transcript.
- My parent/s is/are not a tax filer and I have attached an IRS Verification of Non-Filing. (To obtain a copy of your tax transcript from the IRS website, go to irs.gov/Individuals/Get-Transcript, use form 4506-T, or call 1(800) 908-9946.)

Signatures

- Signatures are required on the certification found on the last page of this packet.
- Answer All Questions. DO NOT LEAVE BLANKS. If something does not apply to you, respond using “N/A” (not applicable) or a “0” (zero).** A blank answer will mean the information is incomplete and you will be asked to complete a new packet which may delay your eligibility for financial aid.

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UCSC Student's ID /Account Number (Do not use CRUZ ID)

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UCSC Student's Last Name

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First Name

1. Print the student's name and ID/account number clearly at the top of all pages of this packet and all documents attached.
 2. The parent and student who provided the financial aid application information must complete and sign the Certification on page 5.
 3. The parent and student must answer all questions. IF THE ANSWER IS ZERO, OR IS NOT APPLICABLE, WRITE IN A "0".
- Student living arrangements during the 2019-20 academic year (check one):

- On Campus
 Off Campus
 With parent(s)

DO NOT LEAVE BLANKS.

FEDERAL TAX RETURNS AND INCOME INFORMATION

STUDENT Please report income earned. Submit copies of all W-2s and 1099s \$_____

Also, list below the names of all employers, the amount earned and whether an IRS W-2 form was provided.

Employer's Name	Amount Earned	Was IRS form provided? (Answer Yes or No)

- I am not required to file a 2017 Federal Tax Return.
 I filed a 2017 Federal Tax Return; a copy of the 2017 tax transcript is attached and all W-2s and 1099s
 I filed a 2017 Foreign Tax Return, a signed copy of the foreign return plus a certified translated in English copy is attached, converted to US Dollars.

PARENT Please report income earned. Submit all W-2s and 1099s \$_____

Also, list below the names of all employers, the amount earned and whether an IRS W-2 form was provided.

Employer's Name	Amount Earned	Was IRS form provided? (Answer Yes or No)

- I am not required to file a 2017 Federal Tax Return and a copy of the IRS Verification of Non-Filing is attached.
 I filed a 2017 Federal tax Return. A copy of the 2017 tax transcript and all W-2s and 1099s is attached.
 I filed a 2017 Foreign Tax Return. A signed copy of the foreign return plus a certified translation in English, converted to U.S. Dollars, is attached.

Do you own and control more than 50% of a business with over 100 employees? yes no

In 2017 or 2018, did you or anyone in your household receive benefits from any of the Federal programs listed? Mark all programs that apply:

- Supplemental Security Income
 Supplemental Nutrition Assistance Program (SNAP)
 Free or reduced price lunch
 TANF
 WIC

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UCSC Student's Last Name

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First Name

FOR THIS SECTION PLEASE REPORT INFORMATION AS OF THE DATE YOU FIRST FILED THE 2019-20 FINANCIAL AID APPLICATION.

Cash, Savings and Checking Accounts	PARENT	STUDENT
	\$ _____	\$ _____

Net Worth of Your Investments

Note: Investments **do not include the home you live in, the value of life insurance, retirement plans (pension funds, annuities, non-education IRA's, Keogh plans, etc.)**

Net worth of your investments, other than investment real estate reported below. Investments include trust funds, UGMA/UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc. Investments also include qualified educational benefits or education savings accounts (e.g. Coverdell savings accounts, 529 college savings plans and the total refund value of all 529 prepaid tuition plans.

PARENT	STUDENT
\$ _____	\$ _____

PARENT(S) REAL ESTATE INVESTMENTS (not included in net worth listed above)

Complete this information for all real estate you (and your spouse) own such as mobile homes, condos, duplexes, rental property, land, summer homes, etc., as of the date the 2019-20 financial aid application was filed. Do not include the home you live in.

Do you the parent(s) own real estate investments excluding the home you live in? Yes No If yes, provide details below.

Property 1 (Do not report the home you live in):

Current Market Value* \$ _____ Mortgage Balance \$ _____ Purchase Price \$ _____ Year Acquired _____

Property Address _____
Street address City State Zip Code

Property 2 (Do not report the home you live in):

Current Market Value* \$ _____ Mortgage Balance \$ _____ Purchase Price \$ _____ Year Acquired _____

Property Address _____
Street address City State Zip Code

Property 3 (Do not report the home you live in):

Current Market Value* \$ _____ Mortgage Balance \$ _____ Purchase Price \$ _____ Year Acquired _____

Property Address _____
Street address City State Zip Code

Complete this section if you, the parent, **RENTED OUT A PORTION OF THE HOME YOU LIVE IN** that meets the following criteria: the rental unit has its own entry and includes a kitchen and bath. The portion of your home that generates rental income is considered an asset and must be reported as an investment net worth on the financial aid application. Complete the following information about the home you live in:

Current Market Value* \$ _____ Mortgage Balance \$ _____ Purchase Price \$ _____ Year Acquired _____

Rental Square Footage _____ + Home Square Footage _____ = Total Dwelling Square Footage _____

*on the date you filed the financial aid application

STUDENT REAL ESTATE INVESTMENTS

Does the student own any real estate investment property yes no

For Office Use Only

Real Estate Net Worth = Total of Net Value of Each Property listed above _____

Total Investments _____ + Real Estate Net Worth _____ = Total Investment Net Worth _____

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UCSC Student's ID /Account Number (Do not use CRUZ ID)

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UCSC Student's Last Name

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First Name

DO NOT LEAVE BLANKS.

FOR THE FOLLOWING OTHER INCOME INFORMATION, PLEASE REPORT 2017 CALENDAR YEAR INFORMATION

PARENT

STUDENT

1. Child support **received** by you (and your spouse) for any of your children. Do not include foster care or adoption payments.

\$ _____ /yr.

\$ N/A /yr.

Name of person who paid child support	Name of person to whom child support was paid	Name of child for whom support was paid	Amount of child support paid in 2016

2. Housing, food, and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits—for example, Resident Assistant (RA) housing benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.

\$ _____ /yr.

\$ _____ /yr.

3. Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.

\$ _____ /yr.

\$ _____ /yr.

4. Other untaxed income not reported, such as workers' compensation, disability benefits, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040—line 25. Don't include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security Benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

List source: _____

\$ _____ /yr.

\$ _____ /yr.

5. Money received as gifts or to make payments on your behalf (e.g. bills) not reported elsewhere on this form. Do not include financial aid. Include money received from a parent or other person whose financial information is not reported on this form and is not part of a legal child support agreement.

Please state source: _____

\$ N/A /yr.

\$ _____ /yr.

6. Child support **paid** by you because of divorce or separation or as a result of a legal requirement. Do not include support for children in your household.

\$ _____ /yr.

\$ N/A /yr.

Name of person who paid child support	Name of person to whom child support was paid	Name of child for whom support was paid	Amount of child support paid in 2016

7. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.

\$ _____ /yr.

\$ _____ /yr.

8. Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay.

\$ _____ /yr.

\$ _____ /yr.

9. Earnings from work under a cooperative education program offered by a college.

\$ _____ /yr.

\$ _____ /yr.

