

STEP 1 – STUDENT INFORMATION

Last Name	First Name	Student ID Number
Permanent Address (include residence and apt. no)	City/State/Zip	Date of Birth
Local Phone No.	Permanent Phone No.	Email Address

STEP 2 – STUDENTS FAMILY SIZE

Independent students should include the following people in family size if they live with the student/student's spouse and will receive more than half of their support from the student/student's spouse between July 1, 2025, and June 30, 2026:

- The student.
- The student's spouse, if married.
- The student's dependent children if they live with the student (or live apart because of college enrollment), they receive more than half of their support from the student, and they will continue to receive more than half their support from the student during the award year.
- The student's other dependents if they live with the student (or live apart because of college enrollment), they receive more than half of their support from the student, and they will continue to receive more than half their support from the student during the award year.
- Don't include unborn children who will be born between July 1, 2025, and June 30, 2026.

Full Name	Age	Relationship (If you need additional space, please attach a separate sheet of paper)
		Self

STEP 3 – STUDENT INCOME AND TAX INFORMATION **Select**

the statement below that describes your 2023 tax filing status:

- ☐ I filed or will file a 2023 income tax return with the IRS or other relevant tax authority.
- ☐ I did not file and am not required to file a 2023 income tax return with the IRS or other relevant tax authority.

List the students amount of income earned from work from all sources in the table below, IF:

- You did not file and were not required to file a 2023 tax return with the IRS or other relevant tax authority; or
- You earned income in a foreign country in 2023, worked for an international organization in 2023 without being required to report income on any tax return, or filed a 2023 tax return with Puerto Rico or another U.S. territory; this includes individuals who reside in Puerto Rico or other US Territories that filed an IRS 1040 or 1040-NR with their local tax authority, not the IRS.

☐ **Not Applicable – I filed a 2023 IRS Tax Return.**

☐ **Not Applicable – I had no income earned from work during the 2023 tax year.**

Amount Earned in 2023 (in US Dollars)	Source of Income Earned	IRS W-2 or Equivalent Included (Yes/No)
\$		
\$		
\$		
TOTAL	\$	

Student ID: _____

STEP 4 – SPOUSE’S TAX AND INCOME INFORMATION

☐ **Not Applicable – I am not married and did not include a spouse contributor on my 2025-2026 FAFSA. SKIP TO STEP 5.**

Enter the information below the spouse that contributed to your 2025-2026 FAFSA below:

Full First Name and Last Name:

Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN) or Employer Identification Number (EIN):

☐ **Not applicable – my spouse does not have a SSN, ITIN or EIN.**

List the amount of income earned from work from all sources in the table below for your spouse, IF:

- The spouse contributor did not file and was not required to file a 2023 tax return with the IRS or other relevant tax authority; or
- The spouse contributor earned income in a foreign country in 2023, worked for an international organization in 2023 without being required to report income on any tax return, or filed a 2023 tax return with Puerto Rico or another U.S. territory; this includes parent(s) who reside in Puerto Rico or other US Territories that filed an IRS 1040 or 1040-NR with their local tax authority, not the IRS.

☐ **Not Applicable – My spouse filed a 2023 IRS Tax Return.**

☐ **Not Applicable – My spouse had no income earned from work during the 2023 tax year.**

Amount Earned in 2023 (in US Dollars)	Source of Income Earned	IRS W-2 or Equivalent Included (Yes/No)
\$		
\$		
\$		
TOTAL	\$	

STEP 5 - CERTIFICATION

By signing this worksheet, I certify all the information reported is complete and correct:

Student Signature

Student First and Last Name
(Please Print)

Student Signature Date
(MM/DD/YYYY)

NOTE: Additional income and/or tax documentation may be required beyond that noted on this worksheet. Review your outstanding document requirements for additional information; contact us @financialaid@downstate.edu