



## Income Verification Statement for the upcoming Academic Year 25-26

### Student Information- Independent

Date: \_\_\_\_\_

Student Name: \_\_\_\_\_

University of Idaho Student ID #: \_\_\_\_\_

Email: \_\_\_\_\_

#### Please check which of the following applies to you.

**Independent Student Definition:** You are considered independent by the Federal Government if you are:

24 years of age by December 31 of award year

Married and/or have legal dependents other than spouse

Veteran of Armed Forces of the United States or currently in the military

An orphan, in foster care, or a ward of the court (now or any time after age 13)

Prior to age 18, an emancipated minor or in legal guardianship as determined by a court

Verified as an unaccompanied youth, homeless or at risk of becoming homeless

### Income Verification for Student

Please provide your taxable income that was filed in 2025 for the previous tax year (2024). This information can be found on the Federal Income Tax Return (Form 1040). To determine program eligibility, we need verification of **taxable income**. This is often about 50% of your adjusted gross income (AGI), see definitions below. Additionally, include the number of dependent family members residing in the household (see definitions below). If you need assistance or have questions, please email [ldann@uidaho.edu](mailto:ldann@uidaho.edu).

#### Required Financial Information:

1) What was your taxable income for the tax year 2024?

\$

2) How many members of the household were included on this tax return, including yourself?

#### Signature

*I declare that the information provided above are to the best of my knowledge and belief are true, correct and accurately list the income received and the size of the family unit during the stated tax year.*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**University of Idaho TRIO McNair Scholars Program**

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[www.uidaho.edu/ed/departments/trio/projects/mcnair](http://www.uidaho.edu/ed/departments/trio/projects/mcnair)

**UI McNair Program Use Only Date**

Received: \_\_\_\_\_

Verified by: \_\_\_\_\_

## Definitions

### **Taxable Income:**

The gross income of an individual, less any allowable tax deductions. Your taxable income is the amount of your income that is subject to income tax. What qualifies as “taxable income” is defined in the Internal Revenue Code Section 63. “Gross income” is defined in Section 61 of the Internal Revenue Code.

Taxable income can be obtained from any of U.S. Individual Income Tax Return. On form 1040, starting with tax year 2023, taxable income is found on line 15.

### **Household Size or Family Unit:**

Family size includes parent(s), or legal guardian(s) whose income is included in the taxable income amount reported and any dependents listed on the tax return, including the student.

**Independent Student:** You are considered independent by the Federal Government if you are:

- 1) 24 years of age by December 31 of award year
- 2) Married and/or have legal dependents other than spouse
- 3) Veteran of Armed Forces of the United States
- 4) An orphan, in foster care, or a ward of the court (now or any time after age 13)
- 5) Prior to age 18, an emancipated minor or in legal guardianship as determined by a court
- 6) Verified as an unaccompanied youth or homeless child or your
- 7) Is a student who the financial aid administrator has determined to be financially independent

For full details and descriptions see: <https://studentaid.ed.gov/sa/fafsa/filling-out/dependency> or 20 U.S. Code § 1087vv

## Privacy Policy

### **Why this information is necessary:**

As a federally funded TRIO program, the McNair Scholars Program is required to provide documentation of a student’s eligibility for the program to the U.S Department of Education and implement the TRIO regulations that state two-thirds of the students served must meet federal low-income guidelines. This information will be used only to determine or verify eligibility for the TRIO Student Support Services program. The U.S. Department of Education provides more information about TRIO and eligibility requirements online at [www.ed.gov/oep/trio](http://www.ed.gov/oep/trio).

### **Information Privacy:**

The UI McNair Scholars program assures that all family income and student information that we collect is kept secure and confidential and is never provided to any agency other than the Department of Education.