SOU McNAIR PROGRAM ELIGIBILITY AND EARNINGS CERTIFICATION

Correct information is essential for determining eligibility. If the information provided here is not accurate, you may be considered ineligible to participate in the McNair Program.

Applicant Full Legal Name: _____
Last Middle First

Certifying Individual's Full Legal Name: _____
Last Middle First

Instructions: Complete **Section A.** and **Section B.** of certification and **sign and date**. *If applicant is a DEPENDENT for financial aid purposes (see description of dependent vs. independent on certification form) parent or guardian MUST sign and submit the earnings certification. A scanned/printed copy of certification is acceptable for application processing, however if the applicant is accepted into the cohort an original signature must be submitted to the McNair office. Federal TRIO Program financial eligibility guidelines are located at: https://www2.ed.gov/about/offices/list/ope/trio/incomelevels.html*

SECTION A: Filing Status

What is your federal tax filing status according to your 2023 taxes? *(Tax filing status descriptions provided can be found at: https://studentaid.gov/sites/default/files/fafsa-dependency.pdf)*

- ❑ **INDEPENDENT** — An independent student is one (at least) of the following: at least 24 years old (on or before December 31st of last year), married, a graduate or professional student, a veteran, a member of the armed forces, an orphan, a ward of the court, or someone with legal dependents other than a spouse, an emancipated minor or someone who is homeless or at risk of becoming homeless.

- ❑ **DEPENDENT** — A dependent student: under the age of 24 on December 31st of last year, do not have a dependent child, not a member of the U.S. Armed Forces, and at any time since you turned 13 one or both of your parents were living, you were not in foster care, nor were you a dependent or ward of the court.

SECTION B: Household Size and Taxable Income

Taxable income is usually lower than Gross income. **Taxable income** is shown on the 2023 **IRS Form 1040, line 10.**

If INDEPENDENT student:

What is the size of your household, including yourself, spouse, and/or other dependents? _____

Did you file a federal income tax return for last year? ❑ Yes ❑ No

Your 2023 household TAXABLE (NOT GROSS) income: $ _____

If DEPENDENT student:

What is the size of your parents' household, including yourself, parent(s) and other dependents? _____

Did you file a federal income tax return for last year? ❑ Yes ❑ No

Did your parents file a federal tax return for last year? ❑ Yes ❑ No

Your 2023 TAXABLE (not gross) income: $ _____

+Your parents' 2023 TAXABLE (not gross) income: $ _____

+Your parents' other dependents' 2023 TAXABLE (not gross) income: $ _____

TOTAL household 2023 TAXABLE income: $ _____

CERTIFICATION:

I certify that all the information provided in the above sections is true, correct, and complete to the best of my knowledge.

Certifying Individual : ❑ Student ❑ Student's Parent/Guardian

Certifying Individual's Name (printed): _____

_____

Certifying Individual's Signature Date
(parent or guardian if applicant is a dependent)