

## Family Income Information

(completed by *legal guardians*)

Marquette University receives funding from the U.S. Department of Education (ED). Federal laws require that Upward Bound keep family income information on file to prove that our students meet the income guidelines set by the Department of ED--a process called "income verification." We collect this information with the application because no student can be admitted into Upward Bound without the appropriate income verification documentation described below. Adhering to federal privacy laws, all financial information is kept confidential and secured in a locking file cabinet. It is not used for any purpose other than to prove student eligibility.

The **LEGAL GUARDIAN(S)** of the applicant must complete one of the following income verification requirements.

1. If the legal guardian(s) was/were employed, attach a **SIGNED** copy of the 1040 or 1040A federal tax returns (pages 1-2 only) filed for the *most recent* tax year. Simply attach the copies of the returns to this Form.

**OR**

2. If the guardians were not employed or did not make enough money to file taxes, please provide complete information below and sign the following:

### "Certification of Income Tax Non-Filing Status."

*I did not and will not file a federal tax return for the past tax year because my gross income was insufficient to require filing.*

**\*\*ONLY FILL OUT THIS STATEMENT IF YOU DID/WILL NOT FILE TAXES\*\***

\_\_\_\_\_  
Male parent or male legal guardian signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Annual Income

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Female parent or female legal guardian signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Annual Income

\_\_\_\_\_  
Social Security Number

**\*\*Again, please understand that income verification is a one-time process to see if your student is eligible for our services. We will not need updated income information in future years.\*\***

# INCOME VERIFICATION FORM

Overview: The Marquette Educational Opportunity Program, Upward Bound Upward Bound Math-Science program is sponsored by a grant from the U.S. Department of Education (DOE), Federal regulations require that UB participants meet certain family income guidelines. The income information required will be held in the strictest of confidence and is available to no one except the DOE representatives for audit purposes. All requested income documentation is required to complete the application.	SIZE OF FAMILY UNIT	TAXABLE INCOME - 2020 FEDERAL
	1	\$19,320
	2	\$26,130
	3	\$32,940
	4	\$39,750
	5	\$46,560
	6	\$53,370
	7	\$60,180
	8	\$66,990
	ADD \$6,810 FOR EACH ADDITIONAL MEMBER	

## INCOME DECLARATIONS

1) **TAX INFO:** Did you file a FEDERAL INCOME TAX (1040, 1040A, 1040EZ) return for last year in 2020?

- YES Look at your tax return** and write your family's 2020 taxable income: \$ \_\_\_\_\_  
 \*On the 2020 federal tax forms, find **taxable income** on the following lines: *Form 1040, Line 15*

**OR attach a copy of your 2020 tax return** (if attaching copy then you do not have to complete this page)

- NO** Please identify the sources of income for your household last year and write the monthly amounts.
- Job/Employment Income: Monthly Amount: \$ \_\_\_\_\_
  - Public Welfare/Assistance (SNAP, WIC, etc.): Monthly Amount: \$ \_\_\_\_\_
  - Social Security: Monthly Amount: \$ \_\_\_\_\_
  - Veterans Benefits: Monthly Amount: \$ \_\_\_\_\_
  - Child Support/Alimony: Monthly Amount: \$ \_\_\_\_\_
  - Pension/Retirement: Monthly Amount: \$ \_\_\_\_\_
  - Unemployment: Monthly Amount: \$ \_\_\_\_\_
  - Other: Monthly Amount: \$ \_\_\_\_\_

**Certification:** All of the information on this STATEMENT OF INCOME is true and correct to the best of my knowledge. If asked by an authorized official, I agree to give proof of the information that we have given on this form. I also realize that purposely giving false or misleading information on this form may result in a fine, a prison sentence or both. I also realize that if I do not give proof when asked, that my child will be denied admittance to TRIO Upward Bound at Marquette University.

Parent/Guardian Signature \_\_\_\_\_

Date \_\_\_\_\_

\*Please attached Documentation (Letter of approval or Monthly summary

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