

2024-25 Verification Worksheet V5

Federal Student Aid Programs

Independent Student

Your financial aid application was selected for review in a process called "Verification." In this process, your college will compare information from your Free Application for Federal Student Aid (FAFSA) with this worksheet and any additional documentation requested for you to submit. The law requires completion of Verification before aid offers and/or disbursement of any federal aid. If there are differences between your FAFSA application and your verification documentation, electronic corrections to your FAFSA may be required. Contact your Financial Aid Office at (XXX) XXX-XXXX if you have questions.

INSTRUCTIONS

- Complete all sections of this worksheet **in full**.
- If you or your spouse (if married) have filed a 2022 Federal Income Tax Return with the IRS:
 - If you have not already done so, log on to studentaid.gov/fafsa and give permission for the Direct Data Exchange (DDX) to transfer your 2022 IRS tax information to your 2024-25 FAFSA.
 - If 2022 income tax return information for you (or spouse, if applicable) was not available or could not be used, please provide a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 1040 income tax return and applicable schedules.
 - Tax transcripts can be requested at <http://www.irs.gov/>.
- If you or your spouse were not required to file a 2022 Federal Income Tax Return with the IRS:
 - Select either B or C under Student and/or Spouse Information on the 2nd page of this form.
 - If you or your spouse had income: attach all 2022 W-2's, 1099s, or other income statements.
 - If you or your spouse do not have a Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), or Employer Identification Number (EIN): submit a letter from the appropriate tax filing authority that the individual(s) did not file taxes.
- Notify the financial aid office if you or your spouse filed separate IRS income tax returns for 2022 or had a change in marital status after December 31, 2022.
- Requested documents **should** be submitted within 30 days of the initial request to be considered for all available Financial Aid.

A. Student Information

Last Name	First Name	M.I.	Student ID
Address (include apt. no.)			Date of Birth
City	State	Zip Code	Phone Number

Identity and Statement of Educational Purpose (To Be Signed at the Institution)

You **must appear in person** at _____ Financial Aid Office to verify your
 (Name of Postsecondary Educational Institution)

identity by presenting a valid unexpired government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of your photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Education Purpose provided below.

Type of documentation submitted: _____

Designated institutional official: _____
 (School official's printed name)

Student ID Number S _____

**Identity and Statement of Educational Purpose
(To Be Signed in the Presence of a Notary)**

If the student is unable to appear in person at _____ to verify his or her identity, the student must provide to the institution:
(Name of Postsecondary Educational Institution)

- (a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and
- (b) The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational Purpose and
(Student's printed name)

that The Federal student financial assistance I may receive will only be used for educational purposes and to pay for the cost of attending _____ for 2024-2025.
(Name of Postsecondary Educational Institution)

Student Signature: _____ Date: _____

Notary Section Instructions: Please Read

This section should only be completed if you are unable to appear in person at the institution with a designated official. This form (the original on which the seal is visible) should be mailed to the Financial Aid Office at your institution along with the copy of the government-issued identification.

Notary's Certificate of	
State of _____	City/County of _____
On _____ (Date)	, before me _____ (Notary's name)
Personally appeared _____ (Printed name of signer)	and proved to me because of
Satisfactory evidence of Identification _____ (Type of unexpired government-issued ID provided)	to be the above-named
Person who signed the foregoing instrument.	
My commission expires on _____, 20 _____	
WITNESS my hand and official seal (SEAL)	
Notary (Print): _____	
Notary (Signature): _____	

Student ID Number S _____

Household Information

Family Size *If more space is required, attach a separate page.

Family Size		
<p>Write the names of all the people in your family size in the chart below:</p> <ol style="list-style-type: none"> 1. Include yourself on the first line. 2. Include your spouse if you are married. 3. Include your children or your spouse's children, if you or your spouse will provide more than half of their support between July 1, 2024, and June 30, 2025, even if the children do not live with you. 4. Include other dependents, if they now live with you and you or your spouse will continue to provide more than half of their support through June 30, 2025. 5. The provided criteria for "dependent children" or "other persons" align with the requirement that family size align with whom the parent could claim as a dependent on a U.S. tax return if the parent were to file a U.S. tax return at the time of completing the 2024-25 FAFSA. As a result, the parent should not include any unborn children in the family size. 		
First & Last Name of Each Family Member	Age	Relationship to Student
(EXAMPLE) <i>Craig Jones</i>	<i>18</i>	<i>Brother</i>
You (The Student)		Self

THIS SPACE INTENTIONALLY
LEFT BLANK

Student ID Number S _____

Independent Student's Information (all applicants)

Check the box that applies:

- a. I filed/will file a 2022 Federal IRS Tax Return, Puerto Rican, or Foreign Income Tax Return.
- b. I was not employed, did not have income, and was not required to file a 2022 Federal IRS Tax Return.
 - If you do not have a SSN, ITIN, or EIN: attach a letter from the appropriate tax filing authority that you did not file taxes.
- c. I was employed and had income, but was not required to file a 2022 Federal IRS Tax Return
 - **Complete the chart below:** list employer(s) and the amount that was earned in 2022.
 - **Attach copies of all 2022 W-2 and 1099 Forms.**
 - If you do not have an SSN, ITIN, or EIN: attach a letter from the appropriate tax filing authority that you did not file taxes.

COMPLETE CHART ONLY IF BOX C IS CHECKED FROM ABOVE

Non-Tax Filers with 2022 earnings are federally required to submit a copy of W-2(s) from each employer to your Financial Aid Office.

Name of Employer	Amount Earned in 2022	2022 W-2 and 1099 Forms received from employer?	2022 W-2, 1099s and Non-Filing Letter attached?
	\$	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/>
	\$	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/>
	\$	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/>

*If more space is required, attach a separate page. **Note: If you lost or never received a W-2, contact your employer to request a copy to provide with this form.**

Spouse's Information (if applicable)

Check the box that applies:

- d. Spouse filed/will file a 2022 Federal IRS Tax Return, Puerto Rican, or Foreign Income Tax Return.
- e. Spouse was not employed, did not have income, and was not required to file a 2022 Federal IRS Tax Return.
 - If you do not have an SSN, ITIN, or EIN: attach a letter from the appropriate tax filing authority that you did not file taxes.
- f. Spouse was employed and had income, but was not required to file a 2022 Federal IRS Tax Return:
 - **Complete the chart below:** list employer(s) and the amount that was earned in 2022.
 - **Attach copies of all 2022 W-2 and 1099 Forms.**
 - If you do not have an SSN, ITIN, or EIN: attach a letter from the appropriate tax filing authority that you did not file taxes.

COMPLETE CHART ONLY IF BOX C IS CHECKED FROM ABOVE

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	\$	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/>
	\$	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/>
	\$	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/>

*If more space is required, attach a separate page. **Note: If you lost or never received a W-2, contact your employer to request a copy to provide with this form.**

Signature

***Forms with digital/electronic/typed signatures cannot be accepted and will be returned.**

Each person signing certifies that all the information reported is complete and correct. If married, the spouse's signature is optional.

Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Student's Signature: _____ Date: _____

Spouse's Signature: _____ Date: _____