

## Verification Worksheet Independent (V1)

Academic Year 2023-2024

Your application has been selected for review in a process called "Verification." In this process, the information from your Free Application for Federal Student Aid (FAFSA) will be compared with you and your spouse's (if applicable) Federal IRS tax information as well as other financial documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach all required documents and submit to the Office of Financial Aid.

### STUDENT INFORMATION

|                                                                                                                                                                        |                                                                                 |                                                                             |                                                                                                                                                                                                    |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|-----------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Student Last Name</u><br><small>Last Name</small><br>Ex: 123 Hoop St Apt 37E<br><small>Address (include apartment number)</small><br>Hampton<br><small>City</small> | <u>Student First</u><br><small>First Name</small><br>WA<br><small>State</small> | <u>Middle Initial</u><br><small>M.I.</small><br>97856<br><small>Zip</small> | <u>Student ID Number</u><br><small>SMU ID Number</small><br><u>Date of Birth</u><br><small>Date of Birth</small><br><u>Student Phone Number</u><br><small>Phone number (include area code)</small> |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|-----------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### FAMILY INFORMATION

Fill in the information below about the people you and your spouse (if applicable) will support between July 1, 2023 and June 30, 2024. INCLUDE YOURSELF, YOUR SPOUSE (if applicable), YOUR CHILDREN AND ANY OTHERS WHO RECEIVE MORE THAN HALF OF THEIR SUPPORT FROM YOU. List the name of the college others will be attending if they are enrolled in a degree, diploma, or certificate program for at least six credits per term between July 1, 2023 and June 30, 2024.

| Name                               | Age        | Relationship to you        | College Attending                       |
|------------------------------------|------------|----------------------------|-----------------------------------------|
| <u>Student First and Last Name</u> | <u>AGE</u> | Self                       | Saint Martin's University               |
| <u>Spouse Name</u>                 | <u>AGE</u> | <u>Spouse Relationship</u> | If Applicable: College Attending or N/A |
| <u>Child Name</u>                  | <u>AGE</u> | <u>Child Relationship</u>  | If Applicable: College Attending or N/A |
|                                    |            |                            |                                         |
|                                    |            |                            |                                         |
|                                    |            |                            |                                         |
|                                    |            |                            |                                         |

### INCOME VERIFICATION INSTRUCTIONS

The easiest way to verify income is to use the IRS Data Retrieval Tool when completing or updating your FAFSA on the federal web site. If you did not use the IRS Data Retrieval Tool when completing or updating the 23-24 FAFSA, you should log back into the FAFSA and use the IRS Data Retrieval tool. If you need instructions to use the tool please visit our website and expand the HELP Forms section under the Financial Aid Forms section.

**In you are unable to use the IRS tool; you must request a 2021 IRS Tax Return Transcript or provide a signed copy of your 2020 1040, 1040A or 1040EZ with all schedules. You can request a 2021 IRS Tax Return Transcript via [www.irs.gov](http://www.irs.gov) or call 1-800-908-9946. Be sure to request a 2021 Tax Return Transcript, NOT an Account Transcript. If you did not and will not file a 2021 Federal tax return, please check the appropriate box below.**

**STUDENT INCOME (Please Select One Box)**

- I used/will use the IRS Data Retrieval process when completing/updating the 2023-24 FAFSA.
  - Please indicate the date you **used the tool /will use** the tool to transfer your 2021 Tax Filing Date Filed \_\_\_\_\_
- My 2021 Federal IRS Tax Return or Transcript(s) is attached *or* I have requested a 2021 IRS Tax Return Transcript from the IRS. (Foreign tax return filers may submit signed photocopies.) **See Income Verification section above for important details.**
  - Please indicate the date you requested the 2021 IRS Tax Transcript \_\_\_\_\_
- I will not file and am not required to file a 2021 Federal tax return, but received a 2021 W-2
  - Write in the amount you earned in 2021 and **enclose all of your 2021 W-2s.** \$ \_\_\_\_\_
- I will not file and am not required to file a 2021 Federal Tax return and did not receive a W-2 in 2021. **If you select this option, you must provide a Verification of Non-Filing Letter from the IRS, even if you earned zero wages in 2021.**
  - If you earned wages in 2021 from odd jobs or other non-W2 jobs, you must report them below.
  - Amount Earned \$ \_\_\_\_\_ Source of Income \_\_\_\_\_

**CERTIFICATIONS AND SIGNATURES**

By signing this worksheet, I/we certify that all of the information reported is complete and correct. I/We also acknowledge that I/we have read and agree to comply with all verification policies as stated by the University. **Failure to submit information in a timely fashion may result in the application being filed as inactive** with no further consideration and no federal aid for the academic year. Student must sign:

|                                              |                              |                                            |                              |
|----------------------------------------------|------------------------------|--------------------------------------------|------------------------------|
| <u>Student Signature</u><br>_____<br>Student | <u>Date</u><br>_____<br>Date | <u>Spouse Signature</u><br>_____<br>Spouse | <u>Date</u><br>_____<br>Date |
|----------------------------------------------|------------------------------|--------------------------------------------|------------------------------|

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

Scan the QR Code below to turn in your documents via Secure Drop Box



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### STUDENT INFORMATION

|                                    |            |      |                                  |
|------------------------------------|------------|------|----------------------------------|
| Last Name                          | First Name | M.I. | SMU ID Number                    |
| Address (include apartment number) |            |      | Date of Birth                    |
| City                               | State      | Zip  | Phone number (include area code) |

### FAMILY INFORMATION

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| Name | Age | Relationship to you | College Attending         |
|------|-----|---------------------|---------------------------|
|      |     | Self                | Saint Martin’s University |
|      |     |                     |                           |
|      |     |                     |                           |
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|         |      |                        |      |
|---------|------|------------------------|------|
| Student | Date | Spouse (if applicable) | Date |
|---------|------|------------------------|------|

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