



## Verification Worksheet Independent (V5)

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 all sections of this worksheet, attach all required documents and submit them to the Office of Financial Aid.***

### STUDENT INFORMATION

<b>Student Last Name</b> <small>Last Name</small> Ex: 123 Hoop St Apt 37E Hampton	<b>Student First Name</b> <small>First Name</small> WA	<b>Middle Initial</b> <small>M.I.</small> 96785	<b>Student ID Number</b> <small>SMU ID Number</small> Date of Birth <b>Student Phone Number</b> <small>Phone number (include area code)</small>
<small>Address (include apartment number)</small> City	<small>State</small>	<small>Zip</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, 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
Student Name	AGE	Self	Saint Martin’s University
Spouse Name (if applicable)	AGE	Spouse Relationship	If applicable: College Attending or N/A
Child Name (if applicable)	AGE	Child Relationship	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 of the Financial Aid Forms page.

If you are unable to use the IRS tool; you must request a 2021 IRS Tax Return Transcript OR provide our office with a signed copy of your 2021 IRS 1040, 1040A or 1040EZ Tax Return. 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 or your parent(s) did not and will not file a 2020 Federal tax return, please check the appropriate box below.





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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

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, 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
		Self	Saint Martin’s University

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**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 \_\_\_\_\_
- My 2021 Federal IRS Tax Return 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.**
  - Please tell us the amount and source of wages if you earned wages in 2021 from odd jobs or other non W2 wage sources.
  - Amount Earned \$ \_\_\_\_\_ Source of Income \_\_\_\_\_

**IDENTITY/EDUCATIONAL PURPOSE STATEMENT**

You **MUST** appear in the Office of Financial Aid in person and present valid government-issued photo identification (driver’s license, non-driver’s license document, or passport).

In addition, you will be required to sign a **Statement of Educational Purpose** WHEN YOU ARE IN THE FA OFFICE.

**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:

\_\_\_\_\_

Student
Date
Spouse (if applicable)
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

