

# 2023-2024 FINANCIAL AID VERIFICATION WORKSHEET INDEPENDENT STUDENT



## A. Student Information

\_\_\_\_\_  
Name (Last, First, MI)

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

\_\_\_\_\_  
Address (Include Apt. No.)

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
City                      State                      Zip Code

\_\_\_\_\_  
Phone Number (Include Area Code)

Your Free Application for Federal Student Aid (FAFSA) was selected for a review process called verification. In this process, Saint Elizabeth University will compare your FAFSA with the information on this worksheet and with any other required documents. Federal regulations require us to ask for this information before disbursing Federal Student Aid. If there are differences, your FAFSA information may need to be corrected. If you have questions about verification, please contact the Financial Aid Office as soon as possible to avoid a delay in the processing of your financial aid.

## B. Family Information

List the people in your household, including:

- Yourself
- Your spouse, if you are married
- Your children, if any, if you will provide more than half of their support from July 1, 2023 through June 30, 2024, or if the child would be required to provide your information if they were completing a FAFSA for 2023-2024. Include children who meet these standards, even if they do not live with you
- Other people if they live with you now and you provide more than half of their support and will continue to provide more than half of their support through June 30, 2024.

Include the name of the college for any household member who will be enrolled at least half time (six credits per term) in a degree, diploma, or certificate program at a postsecondary educational institution (excluding military colleges) any time between July 1, 2023 and June 30, 2024.

| Full Name | Age | Relationship | College                    | Will be Enrolled at Least Half Time (Yes or No) |
|-----------|-----|--------------|----------------------------|---|
|           |     | Self         | Saint Elizabeth University |   |
|           |     |              |                            |   |
|           |     |              |                            |   |
|           |     |              |                            |   |
|           |     |              |                            |   |
|           |     |              |                            |   |

**Please Note:** The Financial Aid Office may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible post-secondary educational institutions is inaccurate.

**Please Complete Sections C and D on Back**

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**C. Tax Return Transcript and Income Information**

**Tax Filer Information**

Complete this section if the student and/or spouse filed or will file a 2021 IRS Federal Tax Return.

|  | Student | Spouse |
|--|---------|--------|
| Check here if you used the IRS Data Retrieval Tool (DRT)                                       |         |        |
| Check here if you will not file and are not required to file a 2021 U.S. Income Tax Return*    |         |        |
| Check here if you did not use the DRT but will use the tool to transfer 2021 IRS data          |         |        |
| Check here if you did not use the DRT and will provide your 2021 Federal Tax Return Transcript |         |        |

**We highly encourage you (and your spouse) to use the IRS Data Retrieval Tool within the FAFSA to transfer federal tax information directly from the IRS to your FAFSA. Otherwise, you can quickly request transcripts by using the IRS's automated self-help service tools. Please visit IRS.gov and click on "Get Your Tax Record" or call 1-800-908-9946.**

**Non-Tax Filer Information\***

Complete this section if the student and/or spouse will not file a 2021 Federal Tax Return. Attach copies of all 2021 W-2 forms.

| Income Source(s) | Student Amount | Spouse Amount |
|------------------|----------------|---------------|
|                  | \$             | \$            |
|                  | \$             | \$            |

**\*Please provide a copy of your "Verification of Nonfiling Letter" dated on or after October 1, 2022 confirming that a 2021 IRS Federal Tax Return was not filed with the IRS.**

**Untaxed Income**

Complete this section if the student and/or spouse received any sources of untaxed income in 2021.

| Sources of Untaxed Income | Student Amount | Spouse Amount |
|---------------------------|----------------|---------------|
| Untaxed Pensions          | \$ /month      | \$ /month     |
| Other                     | \$ /month      | \$ /month     |
| Other                     | \$ /month      | \$ /month     |

**D. Certifications and Signatures**

Each person signing below certifies that all of the information reported is complete and correct. The student and spouse whose information was reported on the FAFSA must sign and date.

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

\_\_\_\_\_  
Print Student's Name

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Spouse's Signature (optional)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date