

## 2023–2024 Verification Worksheet (V5)

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law states that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information Student Financial Services will compare your FAFSA with the information on this worksheet and with any other required documents. If there are any differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to Student Financial Services. We may ask for additional information. If you have questions about verification, contact Student Financial Services as soon as possible so that your financial aid will not be delayed.

### A. Student's Information

Student's Last Name	Student's First Name	Student's M.I.	Student I.D. Number (G#)
Student's Street Address (include apt. no.)			Student's Date of Birth
City	State	Zip Code	Student's Email Address
Student's Home Phone Number (include area code)			Student's Alternate or Cell Phone Number

### B. Student's Household Information

List below the people in your household. Include:

- 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.
- Other people if they now live with you 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, in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2023 and June 30, 2024. *If more space is needed, attach a separate page with your name and G# at the top.*

Full Name	Age	Relationship to you	Name of college family member will be attending	Will be Enrolled at Least Half Time?
		Self	Fuller Theological Seminary	

### C. Independent Student's Income Information to Be Verified

1. **TAX RETURN FILERS—Important Note:** If you (or your spouse, if married) filed, or will file, an amended 2021 IRS tax return, you must contact Student Financial Services before completing this section.

**Instructions:** Complete this section if you, the student, filed or will file a 2021 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool (DRT) that is part of FAFSA on the Web at [FAFSA.gov](https://fafsa.gov).* In most cases, no further documentation is needed to verify 2021 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed. Contact the financial aid office if more information is needed about using the IRS DRT.

**Check the box that applies:**

- I, the student, have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2021 IRS income tax return information into the student's FAFSA.
- I, the student, have not yet used the IRS Data Retrieval Tool in *FAFSA on the Web*, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA once the 2021 IRS income tax return has been filed.
- I, the student, am unable or choose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and instead will provide the school a 2021 IRS Tax Return Transcript(s). (Signature not required)

*To obtain a **2021 IRS Tax Return Transcript**, go to [www.irs.gov](https://www.irs.gov) and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure to request the "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript." Use the Social Security Number and date of birth of the first person listed on the 2021 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2021 IRS income tax return). In most cases, for electronic filers, a **2021 IRS Tax Return Transcript** may be requested from the IRS within 2–3 weeks after the 2021 IRS income tax return has been accepted by the IRS. Generally, for filers of 2021 paper IRS income tax returns, the **2021 IRS Tax Return Transcript** may be requested within 8–11 weeks after the 2021 paper IRS income tax return has been received by the IRS.*

If the student and spouse filed separate 2021 IRS income tax returns, **2021 IRS Tax Return Transcripts** must be provided for both.

- Check here if an IRS tax return transcript(s) is attached to this worksheet.
- Check here if IRS tax return transcript(s) will be submitted later. Verification cannot be completed until the IRS tax return transcript(s) has been received by Fuller.

2. **TAX RETURN NON-FILERS**—Complete this section if you, the student (and, if married, your spouse), will not file and are not required to file a 2021 income tax return with the IRS.

**Check the box that applies:**

- The student (and, if married, the student's spouse) was not employed and had no income earned from work in 2021.
- The student (and/or the student's spouse if married) was employed in 2021 and has listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is attached. [Provide copies of all 2021 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form. *If more space is needed, attach a separate page with your name and G# at the top.*

Employer's Name	2021 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>

### 3. TAX RETURN UNUSUAL CIRCUMSTANCES

#### A. Verification of 2021 IRS Income Tax Return Information for Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2021 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:

- 1) A copy of the IRS Form 4868, “Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,” that was filed with the IRS for tax year 2021; and
- 2) A copy of IRS Form W–2 for each source of employment income received for tax year 2021 and, if self-employed, a signed statement certifying the amount of the individual’s AGI and the U.S. income tax paid for tax year 2021.

#### B. Verification of 2021 IRS Income Tax Return Information for Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2021, provide both of the following:

- 1) A signed copy of the original 2021 IRS income tax return that was filed with the IRS or a 2021 IRS Tax Return Transcript (signature not required) for the 2021 tax year; and
- 2) A signed copy of the 2021 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

#### C. Verification of 2021 IRS Income Tax Return Information for Individuals Who Were Victims of IRS Identity Theft

A victim of IRS identity theft who has been unable to obtain a 2021 IRS Tax Return Transcript or use the IRS DRT must provide a signed copy of the 2021 paper IRS income tax return that was filed with the IRS and a signed copy of IRS Form 14039 “Identity Theft Affidavit” if one was submitted to the IRS. If the individual did not keep a copy of Form 14039 or the IRS did not require him or her to submit one, he or she may provide one of the following:

- 1) A statement signed and dated by the individual indicating that he or she was a victim of IRS identity theft and that the IRS is investigating the matter. The statement must also indicate that the individual submitted a Form 14039 to the IRS, but did not keep a copy of it or that he or she was not required to file the form; or
- 2) A copy of a police report if it was filed related to the IRS identify theft.

#### D. Verification of 2021 Income Tax Return Information for Individuals Who Filed Non-IRS Income Tax Returns

If an individual filed or will file a 2021 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, provide a signed copy of that 2021 income tax return(s).

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

*\*If you are unable to appear in person you must complete the next page with a notary in lieu of Section C\**

The student must appear in person at Fuller Theological Seminary (David Hubbard Library) located at 135 N Madison Ave, Pasadena CA 91101 to verify his or her identity by presenting a valid 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 the student’s photo ID that is annotated with the date it was received and the name of the official at the institution authorized to collect the student’s ID.

In addition, the student must sign in the presence of the institutional official, the following:

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this  
(Print Student's Name)

Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Fuller Theological Seminary for 2023–2024.

\_\_\_\_\_  
(Student's Signature) (Date)

\_\_\_\_\_  
(Student's I.D. #)

**E. Certifications and Signatures**

Each person signing below certifies that all of the information reported is complete and correct. The student must sign this worksheet. If married, the spouse's signature is optional.

**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 ID #

\_\_\_\_\_  
Student's Signature (Required) Date

\_\_\_\_\_  
Spouse's Signature (Optional) Date

**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 **Fuller Theological Seminary** to verify his or her identity, the student must provide to the 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  
(Print Student's Name)

this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending **Fuller Theological Seminary** for 2023-2024.

\_\_\_\_\_  
(Student's Signature) (Date) (Student's ID Number)

### Notary's Certificate of Acknowledgement

State of \_\_\_\_\_

City/County of \_\_\_\_\_

On \_\_\_\_\_, before me, \_\_\_\_\_,  
(Date) (Notary's name)

personally appeared, \_\_\_\_\_, and provided to me on basis of satisfactory  
(Printed name of signer)

evidence of identification \_\_\_\_\_ to be the above-named person who  
(Type of government-issued photo ID provided)

signed the foregoing instrument.

**WITNESS my hand and official seal**

Notary Signature: \_\_\_\_\_

My commission expires on \_\_\_\_\_  
(Date)



*\*Area for stamp or seal of notary\**