



2021-2022 Verification Worksheet

Your 2021-2022 FAFSA was selected for review in a process called **Verification**. The law says that before awarding federal aid, we must ask you to confirm the information reported on your FAFSA. To verify that you provided correct information, you and at least one parent (if you are a dependent student) must complete this worksheet, attach any required documents, and submit all forms to Student Financial Services via fax: [828-412-0257](tel:828-412-0257). Please do not leave any section blank as this will cause your paperwork to be marked as incomplete. Incomplete or unsigned paperwork will result in our inability to disburse your federal aid. **Any adjustments made to your FAFSA as a result of Verification could affect the amount of financial aid you're eligible to receive which could in turn affect your balance due.**

IMPORTANT - This form will be considered invalid if:

- It is not signed by both the student and parent
- All household members are not listed
- 1040 forms are not manually signed by the taxpayer

Student Information:

Last Name	First Name	Montreat Student Identification Number
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Household Information:

List below **all of the people who will be living in your household from July 1, 2021 to June 30, 2022**. Students are considered dependent unless: they are over the age of 24, are married, have dependents, are an orphan/ward of the court, are legally emancipated, or are a veteran/active duty member of the armed forces.

Dependent Students

Include, if applicable

- Yourself
- Your parents (including stepparents)
- Your siblings
- Any other dependents or household members who will receive more than half of their support from the parents

Independent Students

Include, if applicable

- Yourself
- Your spouse
- Your children
- Any other household members who will receive more than half of their support from you or your spouse

Full Name	Age	Relationship to Student	Will be enrolled at least half-time?	Name of College or University
		<i>Self</i>	<i>Yes</i>	<i>Montreat College</i>

Of those listed above, write in the name of the college or university for any family member who will be enrolled *at least half-time* in a degree or certificate program between July 1, 2021 and June 30, 2022.

Student and Parent Income Information

Important Note: If the student or parent filed an amended 2019 IRS tax return, the student or parent must contact Student Financial Services before completing this section.

1. **STUDENT TAX RETURN FILERS**

Check the box that applies:

- The student has used the **IRS Data Retrieval Tool** to transfer their 2019 IRS income information into their FAFSA. *Contact Student Financial Services for instructions on how to use this tool.*
- The student is unable or chooses not to use the IRS Data Retrieval Tool and has attached a **2019 IRS Tax Return Transcript or signed copy of their 2019 1040 Form**. *Contact Student Financial Services to learn how to obtain an IRS tax return transcript.*

2. **PARENT TAX RETURN FILERS**

Check the box that applies:

- The parent has used the **IRS Data Retrieval Tool** to transfer their 2019 IRS income information into the student's FAFSA. *Contact Student Financial Services for instructions on how to use this tool.*
- The parent is unable or chooses not to use the IRS Data Retrieval Tool and has attached a **2019 IRS Tax Return Transcript or signed copy of their 2019 1040 Form**. *Contact Student Financial Services to learn how to obtain an IRS tax return transcript.*

3. **TAX RETURN NONFILERS**

Check the box that applies:

- The **student** was not employed and had no income earned from work in 2019.
- The **parent** was not employed and had no income earned from work in 2019.
- The student/parent was employed in 2019 but will not file and is not required to file an income tax return with the IRS. List below the names of all employers and the amount earned from each employer. Please attach copies of all 2019 IRS W-2 forms issued to the student/parent by all employers, if applicable.

Employer's Name	2019 Amount Earned

Note: If the single parent of a dependent student reports no taxes filed or income earned in 2019, that parent is expected to provide a separate explanation indicating how they support themselves and their dependents (e.g. spousal or familial support, government assistance, etc.).

Child Support Received

Child support was not paid or received by any member of the household in 2020

Student and Parents' Household:

List below the names of any persons who paid or received child support, the names of the children for whom the support was paid or received, and the total annual amount that was received in **2020** for **each** child.

Name of Person Who Paid Child Support	Name of Person Who Received Child Support	Name of Child for Whom Support was Paid	Total amount of Child Support Received in 2020

Note: If there is reason to believe that the information regarding child support paid or received is not accurate, we may require additional documentation, such as:

- A copy of the separation agreement or divorce decree that shows the amount of child support to be provided
- A statement from the individual receiving the child support certifying the amount of child support received
- Copies of the child support payment checks or money order receipts

Certifications and Signatures:

Each person signing below certifies that all the information reported above is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date. Digital or typed signatures will not be accepted; please sign manually with a black pen.

Student Signature _____ Date _____

Parent Signature (of dependent student) _____ Date _____

2021-2022 Identity/Statement of Education Purpose

*This form must be completed and signed either in the presence of a **Notary Public** or a **Montreat College Financial Services designee**. Do NOT complete this form in advance as it will be considered invalid.*

You must complete 1 of the following:

- Mail this signed and notarized form (original copies only) along with a copy of a valid, non-expired government-issued photo identification* to:
 - Montreat College
 - Office of Student Financial Services
 - P.O. Box 1267
 - Montreat, NC 28757.

- 1. Bring the form, in person, to the Financial Services Office with a valid, non-expired government-issued photo identification*

**Valid government-issued photo identification includes, but is not limited to, a driver's license, military identification, or passport.*

Statement of Educational Purpose

I certify that I, _____, (print student's name) am the individual signing this Statement of Education Purpose and that the federal student financial assistance I may receive will only be used for educational purposes to pay for the cost of attending Montreat College for the 2021-2022 award year.

Notary's Certificate of Acknowledgement:

State of: _____ County of: _____

Date: _____

_____ (Student Name) personally appeared before me and provided to me on the basis of satisfactory evidence of identification _____ (type of identification provided) to be the above-named person who signed this document.

Witness my hand and official seal:

Notary signature: _____ Seal: _____

My commission expires on: _____

Official Use Only:

Signature of Financial Services Designee: _____

Type of Identification Provided: _____ Date: _____