

# 2024-2025 Verification Worksheet

Your 2024-2025 FAFSA was selected for review in a process called **Verification**. 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 paperwork to Student Financial Services via email at <a href="mailto:financialservices@montreat.edu">financialservices@montreat.edu</a> or fax at 828-412-0257. Do not leave any section blank or unsigned as this will cause your paperwork to be marked as incomplete and will result in our inability to disburse your federal aid. **We cannot accept pictures of documents; all paperwork should be submitted in .pdf format**. Please note that any adjustments made to your FAFSA as a result of Verification could affect the amount of financial aid you are eligible to receive which could alter your balance due.

## **IMPORTANT – This form will be considered invalid if:**

- It is not signed by both the student and parent (if dependent)
- · All household members, including yourself, are not listed
- 1040 forms are not manually signed by the taxpayer or include an EIN from a preparer

### **Student Information:**

1 4 8 1	F: ( ) I	O
Last Name	First Name	Student Identification Number
Lastinatile	FIISLINGILIE	Suueni luenillalion numbei

## **Household Information:**

List below all of the people who will be living in your household from July 1, 2024 to June 30, 2025. Students are considered dependent *unless* they are over the age of 24, married, have dependents, are an orphan/ward of the court are legally emancipated, or are a veteran/active duty member of the armed forces.

#### <u>Dependent Students</u> <u>Include, if applicable</u>

# Yourself

- Yoursell
- Your parents (including stepparents)
- Your siblings and 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 spouseYour children
- Any other dependents or household members who will receive more than half of their support from you or your spouse.

Full Name	Age	Relationship to Student
		Self

# **Student and Parent Income Information**

1. **STUDENT** TAX RETURN FILERS

<u>Important Note</u>: If the student or parent filed an <u>amended</u> 2022 IRS tax return, the student or parent must contact Student Financial Services at financialservices @montreat.edu before completing this section.

Check	the box that applies:						
	ne student <u>has used</u> the <b>IRS Direct Data Exchange (FA-DDX)</b> to transfer their 2022 IRS income ormation into their FAFSA. Contact Student Financial Services for instructions to learn how to use this tool.						
attac	e student is <u>unable or chooses not to</u> use the IRS Direct Data Exchange (FA-DDX) and has ached a <b>2022 IRS Tax Return Transcript or <u>manually signed</u> copy of their 2022 1040 Form.</b> Intact Student Financial Services to learn how to obtain an IRS tax return transcript.						
2. PAREN	T TAX RETURN FILERS						
Check	the box that applies:						
	The parent <u>has used</u> the <b>IRS Direct Data Exchange (FA-DDX)</b> to transfer their 2022 IRS income information into the student's FAFSA. <i>Contact Student Financial Services for instructions on how to use this tool.</i>						
	parent is <u>unable or chooses not to</u> <b>Tax Return Transcript</b> or <u>manua</u> ces to learn how to obtain an IRS tax	ally signed copy of their 20					
3. TAX RE	ETURN <b>NONFILERS</b>						
Check th	ne box that applies:						
	The <b>student</b> was not employed	and had no income earned f	rom work in 2022.				
	The <b>parent</b> was not employed required, see below*	and had no income earned f	rom work in 2022. <i>Further d</i>	locumentation			
	The student/parent was employ with the IRS. <i>Further documen</i> amount earned from each employers, is student/parent by all employers, is	tation required, see below** oyer. Please attach copies o	List below the names of all e	mployers and the			
	Employer's Name	IRS W-2 or Equivalent Provided?	2022 Amount Earned				

<sup>\*</sup>If the single parent of a dependent student reports no taxes filed or income earned in 2022, that parent **must** provide both an **IRS Verification of Non-filing letter** as well as a separate written explanation indicating how they support themselves and their dependents (e.g., spousal or familial support, government assistance, etc.).

<sup>\*\*</sup>Parents who were employed but were not required to file an income tax return with the IRS must provide an **IRS Verification of Non-filing letter** or a signed statement certifying that the individual(s) attempted to obtain confirmation of non-filing from the IRS and were unable to obtain the required documentation.

### Identification

#### You must complete 1 of the following:

Parent's Signature (Dependent Student)

1. **The student must appear in person at Montreat College** to verify his or her identity by presenting an unexpired government-issued photo identification, such as, but not limited to, a driver's license or passport. In addition, the student must sign, in the presence of the institutional official, the <u>Statement of Educational Purpose</u> provided below.

2. The student must provide via email or fax a copy of an unexpired valid government-issued photo

or

identification that is acknowledged in the attached notary statement as well as a notarized Statement of Educational Purpose. **Statement of Educational Purpose** \_\_\_\_\_, (print student's name) am the individual signing this Statement of I certify that I, \_\_\_\_ 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 2024-2025 award year. **Notary's Certificate of Acknowledgement** State of \_\_\_\_\_ City/County of \_\_\_\_\_ On (date) \_\_\_\_\_, before me (notary's name), \_\_\_\_\_ personally appeared (printed name of signer), \_\_\_\_\_ and proved to me because of satisfactory evidence of identification (type of unexpired government-issued photo ID provided) \_\_\_\_\_\_ to be the above-named person who signed the foregoing instrument. WITNESS my hand and official seal: Notary Signature \_\_\_\_\_ My commission expires on (date) \_\_\_\_ **Certifications and Signatures:** Each person signing below certifies that all of the information reported is complete and correct. Digital or typed signatures will not be accepted; please sign manually in black ink. Student's Signature and Montreat ID Number Date

Date