



2023–2024 Aggregate Verification Worksheet

V5-Independent Student

Your 2023–2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called “Verification”. The Financial Aid Office at your college must compare information from your FAFSA with information you provide on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected and your Financial Aid Office could require additional documentation. You will not receive federal financial aid until all verification requirements are met and the necessary corrections made.

What You Should Do

1. If you (or your spouse, if you are married) are tax filers, obtain a **2021 IRS Tax Return Transcript** for yourself and/or your spouse. Request an IRS Tax Return Transcript online at www.irs.gov/Individuals/Get-Transcript or by phone at 1-800-908-9946. Make sure you select an IRS Tax Return Transcript and NOT the IRS Tax Account Transcript. Be sure to specify **tax year 2021** when making your request. In place of the transcript, the Financial Aid Office can accept a complete signed copy of a preparer’s **2021 Federal Income Tax Return (Form 1040, 1040A or 1040EZ)** that was submitted to the IRS. **Important Note:** If you used the IRS Data Retrieval Tool to transfer your 2021 income data into your FAFSA, you may not have to submit the IRS Tax Return Transcript.
2. If you (or your spouse) had income earned from work in 2021, but did not and were not required to file a tax return, you both must provide a **2021 Verification of Non-Filing Letter** dated on or after October 1, 2021, and all **W-2 forms** for tax year 2021 issued to you by your employers. Request a Verification of Non-Filing Letter at www.irs.gov/Individuals/Get-Transcript or by phone at 1-800-908-9946.
3. Complete Sections A-C of this worksheet – you must sign the Section D certification on page 2 of the worksheet. Collect the documents required for Section E on page 3 but do **NOT** complete that page in advance.
4. Submit the completed worksheet, tax return transcript(s) and any other required documents to the Financial Aid Office at your college. You will complete Section F in person at that time.

A. Student’s Information

Student’s Last Name	First Name	M.I.	Student’s Social Security Number
Student’s Street Address (include apt. no.)			Student’s LIMID
City, State, Zip Code			Student’s Date of Birth
Student’s Phone Number (include area code)			Student’s LIM Email Address

B. Student’s Household Information

List the people you will support between July 1, 2023 and June 30, 2024. Include:

- Yourself and your spouse (if you are married)
- Your other children if you (or your spouse) provide more than half of their support, even if they don’t live with you.
- Other people if they now live with you, and you now provide more than half of their support and will continue to provide more than half of their support through June 30, 2024.

Write the name of the college below 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 student’s name and the last 4 digits of student’s SSN at the top.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
<i>Example: Jane Smith</i>	<i>18</i>	<i>Sister</i>	<i>State University</i>	<i>Yes</i>
		Self		

Student Name:	Student SSN: XXX-XX- _____
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C. Student/Spouse’s Income Information to Be Verified

NOTE: Notify your Financial Aid Office if your or your spouse had a change in marital status after December 31, 2022. If you or your spouse filed an amended 2021 IRS tax return, you may be required to submit additional documentation to the Financial Aid Office at your college.

Check the appropriate box (or boxes):

I used the IRS Data Retrieval Tool in FAFSA-on-the-Web to transfer 2021 IRS income tax information into the FAFSA. *[The income tax information from the FAFSA will be used to complete the verification process.]*

I did not (or could not) transfer my/our 2021 income information to the FAFSA using the IRS Data Retrieval Tool. I/we have attached a copy to this worksheet of my/our **2021 IRS Tax Return Transcript** or a signed preparer’s copy of the **2021 Federal Income Tax Return (Form 1040, 1040A or 1040EZ)** that was submitted to the IRS. *[Note: if you filed a joint tax return, but reported your marital status on the FAFSA as separated, divorced or widowed, you must include copies of all IRS Form W-2s with the tax transcript.]*

I/we have not filed (and are not required to file) a 2021 federal income tax return and I/we had no income earned from work in 2021. I/we have each attached a **2021 Verification of Non-Filing Letter** to this worksheet.

I/we have not filed (and are not required to file) a 2021 federal income tax return but I/we had income earned from work in 2021 as listed below. I/we have each attached a **2021 Verification of Non-Filing Letter** to this worksheet. *[List every employer and the amounts earned in 2021, even if an IRS Form W-2 was not issued. You must attach copies of all 2021 IRS Forms W-2 that were issued to you by your employers.]*

Only complete this grid if you are a non-tax filer that had earned income in 2021. *If more space is needed, attach a separate page with student’s name and the last 4 digits of student’s SSN at the top.*

Employer’s Name	2021 Amount Earned	2021 IRS Form W2 Attached?
<i>Example: ABC Company</i>	<i>\$1367.75</i>	<i>Yes</i>

D. Certification and Signatures

I/we certify that all the information reported on this worksheet is complete and correct. I/we understand that if we purposely give false or misleading information, I/we could be fined, jailed, or both. *[If student is married, the spouse’s signature is optional.]*

Student Signature	Date
Spouse Signature	Date

Do not mail this worksheet to the U.S. Department of Education.

Submit this worksheet to the Financial Aid Office at your college.

You should make a copy of this worksheet and all submitted documents for your records.

You must complete Section E on page 3 of this worksheet IN PERSON at the Financial Aid Office at your college.

Identity and Statement of Educational Purpose

OPTION B: BY MAIL

If the student is unable to appear in person at LIM College 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. Fax or email copies will not be accepted. Submit by mail only.

Identity and Statement of Educational Purpose (To Be Signed in the Presence of a Notary)

I certify that I _____ am the individual signing this statement of
(Print Student's Name)
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 LIM College for 2023-2024.

(Student's Signature) (Date) (University ID)

Notary's Certificate of Acknowledgement

State of _____
City/County of _____
On _____ before me, _____
(Date) (Notary's Name)

personally appeared, _____ and proved to me
(Printed Name of Signer)

on the basis 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:

My commission expires on _____
(Date) (Notary Signature)

A valid unexpired government-issued photo identification (Photo ID) can include, but not limited to, the following U.S. Passport, Driver's License, Other State-issued ID, Permanent Resident Card or Resident Alien Card (I-551) and Certificate of Naturalization if it contains a recognizable photo (even though it does not have an expiration date).