

Federal Student Aid Program Verification Worksheet for 2023-2024

Lindenwood University Saint Charles

Your application was selected by the U.S. Dept. of Education for review in a process called "verification." In this process, we are required by federal law (34 CFR, Part 668) to compare the information from your application with the information provided on this form by using the IRS data retrieval tool or a **signed** copy of your **2021** Federal IRS Tax Return (and your spouse's if you are married, or your parents' if you are considered dependent for federal aid purposes). If there are differences between your application and the documents you have submitted, corrections may need to be made. We cannot process your federal financial aid until verification has been completed, so please provide the required documents **as soon as possible**.

A. Student Information:

What you must do:

1. Collect yours (and your spouse or your parents) financial documents: **2021** IRS Federal Tax Return, **2021** W2's, IRS Verification Non-Filing/4506T, etc. . .
2. **Complete all sections below, print, and sign the worksheet.** Your parents must also sign if you are required to provide their income information.
3. **Upload***, hand deliver, or mail the completed verification worksheet, **signed** IRS documents, and any other documents to Student Financial Services.
4. *Upload through the "**UPLOAD Document**" box in the student portal My Documents "**Document Center**" area.
5. An SFS Coordinator will compare the information on the documents you submit to your FAFSA and make corrections, if necessary.

Last Name	First Name	M.I.	Social Security Number or Student ID#	
Address (include apt. #)		City	State	ZIP Code
Date of Birth	Lindenwood E-mail Address		Phone Number (include area code)	

B. Family Information:

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Independent Student: List the people in your household. Include (a) yourself and your spouse, if you have one; (b) your children, if you will provide more than half of their support from July 1, 2023, through June 30, 2024; and (c) 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 from July 1, 2023, through June 30, 2024. Keep in mind if not immediate family we may ask for additional documentation.

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Dependent Student: List all of the people in your parents' household. Include (a) yourself and your parent(s) (including stepparent), even if you don't live with your parents; (b) your parents' other children, even if they don't live with your parent(s) if (1) your parents provide more than half of their support from July 1, 2023, through June 30, 2024, or (2) the children would be required to provide parental information when applying for federal student aid; and (c) other people if they now live with your parents and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2023, through June 30, 2024. Keep in mind if not immediate family we may ask for additional documentation.

Write the names of **ALL** household members and include the name of the college if any of your family members will be attending college at least half-time between July 1, 2023, and June 30, 2024, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Please complete every section of the table below for each member of your household.

Full Name	Age	Relationship to Student	College Attending '23-'24
Example: Sally Sue	20	Sister	Agrate City University / N.A.
		Self / Lindenwood Student	Lindenwood University
		Parent/ Spouse/Step-Parent	
		Parent/Step-Parent/Siblings	
		Siblings/Child	
		Siblings/Child	
		Siblings/Child	
		Siblings/Child	
		Siblings/Child	

C. Student Tax Forms and Income Information (all applicants)

- 1) Check only one box below.
- ☐ Check here if you did not file and were not required to file a 2021 IRS Federal tax return; **see question number 3.**
 - ☐ Check here if you used the IRS data retrieval tool through FAFSA.
 - ☐ Check here if you are attaching a **signed** copy of your 2021 IRS Federal tax return.
- 2) Funds received for child support and other untaxed income. (See question 44 of the FAFSA)

Sources of Untaxed Income	2021 Amount	Sources of Untaxed Income	2021 Amount
a. Child Support	\$	d. SNAP for 2021 or 2022	\$
b. Workman's Compensation	\$	e. Other untaxed income	\$
c. Untaxed Pensions	\$	f.	\$

- 3) If you did not file and were not required to file a 2021 IRS Federal tax return, list below your employer(s) and any income received in 2021 **and attach copies of your 2021 W2's or a 2021 IRS Wage and Income Transcript.**

Sources (Relationship i.e., family member, friend, spouse, Fiancé, etc.)	2021 Income
Money received or paid on your behalf	\$
	\$

D. Spouse Tax Forms and Income Information (if student is married)

- 1) Check only one box below.
- ☐ Check here if your spouse did not file and was not required to file a 2021 IRS Federal tax return; **see question number 3.**
 - ☐ Check here if you used the IRS data retrieval tool through FAFSA.
 - ☐ Check here if you are attaching a **signed** copy of your and your spouse's joint 2021 IRS Federal tax return.
 - ☐ Check here and attach a copy of your spouse's **signed** 2021 IRS Federal tax return if your spouse filed a separate return.

- 2) Funds received for child support and other untaxed income. (See question 44 of the FAFSA)

Sources of Untaxed Income	2021 Amount	Sources of Untaxed Income	2021 Amount
a. Child Support	\$	d. SNAP for 2021 or 2022	\$
b. Workman's Compensation	\$	e. Other untaxed income	\$
c. Untaxed Pensions	\$	f.	\$

- 3) If your spouse did not file and was not required to file a 2021 IRS Federal tax return, list below your spouse's employer(s) and any income received in 2021 **and attach copies of your spouse's 2021 W2's or a 2021 IRS Wage and Income Transcript.**

Sources (Relationship i.e., family member, friend, spouse, Fiancé, etc.)	2021 Income
Money received or paid on your behalf	\$
	\$

E. Parent Tax Forms and Income Information

- 1) Check only one box below.
- ☐ Check here if your parent(s) did not file and were not required to file a 2021 IRS Federal tax return; **see question number 3.**
 - ☐ Check here if your parent(s) used the IRS data retrieval tool through FAFSA.
 - ☐ Check here if your parent(s) are attaching a **signed** copy of your parent's 2021 IRS Federal tax return.
- 2) Funds received for child support and other untaxed income. (See question 92 of the FAFSA)

Sources of Untaxed Income	2021 Amount	Sources of Untaxed Income	2021 Amount
a. Child Support	\$	d. SNAP for 2021 or 2022	\$
b. Workman's Compensation	\$	e. Other untaxed income	\$
c. Untaxed Pensions	\$	f.	\$

- 3) If your parent(s) did not file and were not required to file a 2021 IRS Federal tax return, list below their employer(s) and any income received in 2021 **and attach copies of their 2021 W2's or a 2021 IRS Wage and Income Transcript.**

Sources (Relationship i.e., family member, friend, spouse, Fiancé, etc.)	2021 Income
Money received or paid on your behalf	\$
	\$

F. Sign This Worksheet

By signing this worksheet, I (we) certify that all information reported on this worksheet is complete and correct. If student is a dependent, at least one parent must sign. **Warning:** If you or anyone else purposely gives false or misleading information on this worksheet, you may be fined, sentenced to jail, or both. Upload this completed worksheet along with copies of all required documentation to the "SUBMIT Document" link found in the Student Portal > Administrative Services > "My Financial Aid Documents" tab.

Student Signature

Date

Parent Signature

Date

DO NOT type or print signatures.