



Financial Aid Office

2400 Ridge Road • Berkeley, CA 94709-1212 • Ph: (510) 649-2469
Email: finaid@gtu.edu • Web: <http://gtu.edu/admissions/financial-aid>

2023-2024 Independent Student Verification Worksheet

Your 2023-24 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification, by the Central Processing System (CPS). Applicants selected for verification are required to confirm specific information based on their Verification Tracking Status to ensure accuracy of the information submitted. Verification Statuses are indicated on an applicant’s Student Aid Report (SAR). Those selected for V1 must complete sections A through D; V4 applicants must complete section E, and V5 applicants must complete all sections of this form. For more detailed information and guidance please read the [2023-2024 Verification Policy](#).

A. Student’s Information

Last Name	First Name	M.I.	Student ID Number or Last Four Digits of SSN
Your Street Address (include apt. no.)			Date of Birth
City	State	Zip Code	Email Address
Home Phone Number (include area code)			Alternate or Cell Phone Number

B. Student’s Family Information

List below the people in your household. Include:

- Yourself.
- Your spouse, if you are married.
- Your children, if any, if you will provide *at least 51% of their support* from July 1, 2023, through June 30, 2024.
- Other people if they now live with you *and* you provide *at least 51% 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, provide a separate page with your name and student ID number or the last four digits of your SSN.*

	Full Name	Age	Relationship to student	Name of College the person will attend between 07/01/23-06/30/24	Will be Enrolled at Least Half-Time
	<i>Marty Jones(example)</i>	28	<i>Wife</i>	<i>Central University</i>	<i>Yes</i>
1			Self	Graduate Theological Union	yes
2					
3					
4					
5					
6					
7					

C. Student's Income Information to Be Verified

1. TAX RETURN FILERS

If you are required to file a 2021 IRS tax return and did not use the IRS Data Retrieval Tool (DRT), you must submit a **signed copy of a 2021 IRS form 1040** and applicable schedules or a **2021 tax return transcripts** for yourself and your spouse, if married.

- I have used the IRS DRT.
- I have not used the IRS DRT but will use it to transfer 2021 IRS tax return information into my 2023-24 FAFSA.
- I have attached a copy of my (*and my spouse's, if married and filed separately*) signed 2021 IRS form 1040 and applicable schedules or a 2021 IRS tax return transcript(s).

- I am unable or choose not to use the IRS DRT and will provide a *signed* copy of my 2021 IRS form 1040 and applicable schedules or a copy of my 2021 IRS tax return transcript(s).
If you are unable to use the IRS DRT, tax return transcripts can be printed or saved to your computer directly from the IRS website. Go to <http://www.irs.gov/individuals/Get-Transcript> to set up an account and access your tax return transcript.

Please Note: *Verification cannot be completed and any financial aid awarded will remain conditional until the IRS tax return transcript or signed 1040 has been submitted to the Financial Aid Office.*

- I filed or will file an amended 2021 IRS tax return.
Please submit a *signed* copy of your 1040x or documentation from the IRS that include the change(s) made by the IRS, in addition to a copy of your original 2021 IRS Tax Return Transcript(s) or a *signed* copy of the 2021 IRS Form 1040 and the applicable schedules that were filed with the IRS.
- I have been granted a filing extension by the IRS.
You must submit copies of all W-2s, a copy of IRS Form 2350 (the IRS's approval of an extension beyond the automatic six month extension), a Verification of Non-filing (VNF) Letter (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2022. Self-employed individuals must also send a signed statement with amount of Adjusted Gross Income and US income tax paid for 2021. ***If aid is awarded and disbursed based on tax extension data submitted, actual tax transcripts or submission of IRS Data Retrieval must be supplied to the Financial Aid Office by December 1, 2023 to avoid potential requirement to return funds that have been released.***

Married, Filed Separate 2021 Federal Tax Returns

If you and your spouse filed separate 2021 IRS income tax returns, the IRS DRT cannot be used. Please submit *signed* copies of you and your spouse's 2021 IRS form 1040 and applicable schedules or the 2021 IRS Tax Return Transcript(s) for each.

- Check here if IRS 2021 1040 or IRS 2021 tax return transcripts are attached.
- Check here if 2021 IRS 1040 or 2021 IRS tax transcripts will be submitted later. Please Note: *Verification cannot be completed and any financial aid offered will remain conditional until the IRS tax return transcript or 1040 has been submitted to the Financial Aid Office.*

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. **Note:** You will be required to provide documentation from the IRS or other relevant tax authority dated *on or after* October 1, 2022 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority.

- I (and, if married, my spouse) was not employed and had no income earned from work in 2021.
- I (and/or the student's spouse if married) was employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is attached. Attach copies of all 2021 W-2 forms issued to you (and, if married, to your spouse) by 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 Student ID number at the top.*

Name of Employer(s)	Student 2021 Income Earned	Spouse 2021 Income Earned	IRS W-2 or Equivalent Document Provided?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$0.00</i>	<i>\$2,000.00</i>	<i>Yes</i>
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	

3. NON-IRS INCOME TAX RETURNS

- If you filed an income tax return with Guam, the Commonwealth of Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands you may provide a signed copy of your income tax return that was filed with the relevant tax authority. If the Financial Aid Office has reason to question the accuracy of the information on the signed copy of the income tax return, you must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed;
- If you filed an income tax return with the tax authority for American Samoa you must provide a copy of your tax account information; or,
- If you filed an income tax return with tax authorities not mentioned above, such as a foreign tax authority, and you are unable to obtain the tax account information free of charge, you must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of your income tax return that was filed with the relevant tax authority.

D. Certification and Signatures

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

WARNING: Any person who knowingly makes a false statement or misrepresentation on this form or on any accompanying document is subject to penalties that may include fines, imprisonment, or both, under the US Criminal Code and 20 U.S.C. 1097.

Print Student's Name

GTU Student ID Number or Last 4 Digits of SSN

Student's Signature (Required)

Date

Spouse's Signature (Optional)

Date

THIS PAGE LEFT INTENTIONALLY BLANK



Financial Aid Office

2400 Ridge Road • Berkeley, CA 94709-1212 • (510) 649-2469

Email: finaid@gtu.edu • Web: <http://gtu.edu/admissions/financial-aid>

E. Identity and Statement of Educational Purpose

Last Name First Name M.I. Student ID Number or Last Four Digits of SSN

By federal regulation, this form must be signed at the GTU in the presence of a Financial Aid Administrator.

You must appear at the Financial Aid Office to verify your identity by presenting an unexpired valid government-issued photo identification (ID), such as but not limited to, a driver’s license, other state-issued ID, or a passport. The Financial Aid Office 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.

If you are unable to appear in person to submit this worksheet, you will need to mail a copy of your valid government-issued photo ID along with this worksheet notarized by a public notary.

I certify that I _____ am the individual signing this Statement of Educational Purpose and
Print Student’s Name

that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of

attending the Graduate Theological Union for the 2023-2024 academic year.
Name of Postsecondary Educational Institution

Student’s Signature _____ **Date** _____

Notary’s Certificate of Acknowledgement (If you are unable to appear in person)

State of _____ City/County of _____ on _____
Date

before me, _____, personally appeared, _____
Printed name of notary Printed name of student

and proved to me on the basis of satisfactory evidence of identification _____
Type of valid unexpired government-issued photo ID provided

signed the foregoing instrument.

WITNESS my hand and official seal _____
Notary signature Date commission expires

SEAL