



ST. LAWRENCE UNIVERSITY

2023-2024 Financial Aid Independent Verification Worksheet (V5)

Complete all sections (A-F). If a section does not apply, enter "NA" - **do not leave any section blank.**

A. Student Information

_____	_____	_____	_____
Last Name	First Name	M.I.	SLU ID#
_____			_____
Address			Home Phone (include area code)
_____	_____	_____	_____
City	State	ZIP Code	Cell Phone (include area code)

B. Household Information

Number of Household Members: List below the people in the student's household. Include:

- The student and the student's spouse, if the student is married.
- The student's or spouse's children if the student or spouse will provide more than half of the children's support from July 1, 2023 through June 30, 2024, even if a child does not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of the other person's support, and will continue to provide more than half of that person's support through June 30, 2024.

Number in College: Include in the space below information about any household member who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2023 and June 30, 2024, and include the name of the college.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Full Name	Age	Relationship	College
		Self	St. Lawrence University

Note: We may require additional documentation if we have reason to believe that the information regarding household members enrolled in eligible postsecondary educational institutions is inaccurate.

C. Student and Spouse Tax Filers

Instructions: Check the appropriate box below that describes your 2021 tax filing status.

- The student and spouse (if married) did not file a 2021 tax return (Proceed to Section D).
- The student and spouse (if married) has used the IRS DRT in *FAFSA on the Web* to transfer 2021 IRS income tax return information into the student's FAFSA. Submit a copy of all 2021 W-2 forms.
- The student and spouse (if married) has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA. Submit a copy of all 2021 W-2 forms.
- The student and spouse (if married) is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the institution with **a signed copy of the 2021 income tax return and applicable schedules or a 2021 IRS Tax Return Transcript(s), as well as all 2021 W-2 forms.**

A **2021 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by Mail – Go to www.irs.gov; click “Get Your Tax Record”. Click “Get Transcript by MAIL”. Make sure to request the “Return Transcript” and **NOT** the “Account Transcript”. The transcript is generally received within 10 business days from the IRS’s receipt of the online request.
- Get Transcript Online – Go to www.irs.gov; click “Get Your Tax Record”. Click “Get Transcript Online”. Make sure to request the “Return Transcript” and **NOT** the “Account Transcript”. To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone in the user’s name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS’s two-step authentication.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS’s receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS’s receipt of the paper request form.

If the student and spouse filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and a **signed copy of the 2021 income tax return and applicable schedules or a 2021 IRS Tax Return Transcript(s)** must be provided for each.

D. Student and Spouse Nontax Filers

Instructions: Complete this section if the student and spouse, if married did not file and was not required to file a 2021 income tax return with the IRS.

- The student and spouse (if married) was not employed and had no income earned from work in 2021.
 - Submit a "Verification of Non-filing Letter" from the IRS (see instructions below) for both the student and spouse (if married)

- The student and spouse (if married) was employed in 2021 and has listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2021 IRS W-2 forms issued by the employers]. List every employer even if the employer did not issue an IRS W-2 form.
 - Submit a "Verification of Non-filing Letter" from the IRS (see instructions below) for both the student and spouse (if married)

If more space is needed, provide a separate page with the student's name and ID number at the top.

Employer	Annual Amount Earned in 2021	W-2 Received?
<i>(Example) ABC's Auto Body Shop</i>	\$4,500.00	Yes
Total Amount of Income Earned From Work	\$	

How to obtain a "Verification of Non-filing Letter" from the IRS.

- Go to www.irs.gov; click "Get Your Tax Record". Click "Get Transcript Online" and request "Verification of Non-filing Letter". To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- OR submit paper request Form 4506-T to the IRS. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

Student Name: _____

E. Verification of Identity and Statement of Educational Purpose

Identity and Statement of Educational Purpose (To Be Signed at the Institution)

The student must appear in person at the St. Lawrence University Financial Aid Office to verify their 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 passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

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

If the student is unable to appear in person at the St. Lawrence University Financial Aid Office to verify their 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

Student Name: _____

Statement of Educational Purpose

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 St. Lawrence University for 2023-2024.

(Student's Signature)

(Date)

(Student's ID Number)

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 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
(seal)

(Notary signature)

My commission expires on _____
(Date)

F. Certification and Signatures

Each person signing below certifies that all of the information reported is complete and correct.

Student Signature Date

Spouse Signature Date

WARNING
If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.

Submittal Information

**St. Lawrence University
Office of Financial Aid
23 Romoda Drive
Canton, NY 13617**