



# ST. LAWRENCE UNIVERSITY

## 2020-2021 Financial Aid Independent Verification Worksheet (V5)

Complete all sections (A-H). 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, 2020 through June 30, 2021, 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, 2021.

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, 2020 and June 30, 2021, 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 2018 tax filing status.

- ☐ The student and spouse (if married) did not file a 2018 tax return (Proceed to Section D).
- ☐ The student and spouse (if married) has used the IRS DRT in *FAFSA on the Web* to transfer 2018 IRS income tax return information into the student's FAFSA. Submit a copy of all 2018 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 2018 IRS income tax return information into the student's FAFSA. Submit a copy of all 2018 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 **2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules as well as all 2018 W-2 forms.**

A **2018 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by Mail – Go to [www.irs.gov](http://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](http://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 (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.
- 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 2018 IRS income tax returns, the IRS DRT cannot be used and the **2018 IRS Tax Return Transcript(s) or a signed copy of the 2018 income tax return and applicable schedules** must be provided for each.

Student Name: \_\_\_\_\_

#### **D. Student and Spouse Nontax Filers**

**Instructions:** Complete this section if the student and spouse, if married will not file and is not required to file a 2018 income tax return with the IRS.

- ☐ The student and spouse (if married) was not employed and had no income earned from work in 2018.  
☐ 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 2018 and has listed below the names of all employers, the amount earned from each employer in 2018, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2018 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.

<b>Employer</b>	<b>Annual Amount Earned in 2018</b>	<b>W-2 Received?</b>
<i>(Example) ABC's Auto Body Shop</i>	<i>\$4,500.00</i>	<i>Yes</i>
<b>Total Amount of Income Earned From Work</b>	<b>\$</b>	

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

- Go to [www.irs.gov](http://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: \_\_\_\_\_

### **C. High School Completion Status**

Provide **one** of the following documents to indicate the student's high school completion status when the student begins college in 2020-2021:

- A copy of the student's high school diploma.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A State certificate or transcript received by the student after the student passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- For a student who was homeschooled in a State where State law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.
- For a student who was homeschooled in a State where State law does not require the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a transcript, or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary education in a homeschool setting.

A student who is unable to obtain the documentation listed above must contact the Financial Aid Office.

Student Name: \_\_\_\_\_

## **D. 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 St. Lawrence University to verify his or her 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 St. Lawrence University 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

### **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 2020-2021.

\_\_\_\_\_  
(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)

Student Name: \_\_\_\_\_

## E. Certification and Signatures

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

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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**