



The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of the FAFSA on the Web at FAFSA.gov. If there are differences between your application information and your financial documents, Southern may need to make electronic corrections. Your initial award and changes can be viewed by logging into your account on the Financial Aid Self Service website through myaccess.southern.edu.

What you should do

1. If you did not use the IRS Data Retrieval on your FAFSA, you must submit a 2024 tax return transcript or a signed copy of your tax return.
2. Complete and sign this worksheet. **Parent signature is needed for dependent students**).
3. Submit the completed worksheet, tax forms, and any other requested documents to the financial aid office as soon as possible.

Completed verification documents must be submitted no later than the final week of the currently enrolled semester to ensure federal aid can be processed. Failure to complete the verification process will result in the loss of federal aid and in some cases, state and institutional aid as well.

A. Student Information

Full Name: _____

Last 4 SSN: _____

Home Address:

: Date of Birth:

City: _____

State: _____ Zip Code: _____

Phone Number: _____

E-mail Address: _____

B. Household Size and Number in College

➤ **Dependent Student**

List the people in your parent(s) household, including:

- Yourself and your parent(s) (including step-parent), even if you don't live with your parents.
- The parents' other children if the parents will provide more than half of the children's support from July 1, 2026, through June 30, 2027, or if the other children would be required to provide parental information if they were completing a FAFSA for 2026-2027. Include children who meet either of these standards, even if a child does not live with the parents
- Other people if they now live with your parent(s), and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2026.

➤ **Independent Student**

List the people in your household; including:

- Yourself, and your spouse, if married
- Your children, if any, if you will provide more than half of their support from July 1, 2026 through June 30, 2027.
- 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, 2026 through June 30, 2027.

Write the names of all household members in the space(s) below. Also write in the name of the college for any household member, excluding your parent(s), who will be attending at least half time between July 1, 2026 and June 30, 2027, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

[illegible]

C. Student's Income Information

1. **TAX RETURN NON-FILERS** – Complete this section if the student will not file and is not required to file a 2024 income tax return with the IRS. Check the box that applies:
- ☐ The student was not employed and had no income earned from work in 2024.
 - ☐ The student was employed in 2024 and has listed below the names of all students' employers, the amount earned and whether an IRS W-2 form is attached. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page.*

Employer's Name	2024 Amount Earned	IRS W-2 Attached?
Suzy's Auto Body Shop (example)	\$2000.00 (example)	Yes (example)

2. **TAX RETURN FILERS** – **Important Note:** If the student filed, or will file, an amended 2024 IRS tax return, the student must contact the financial aid office before completing this section.

Check the box that applies:

- ☐ The student has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2024 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA.
- ☐ The student has not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2024 IRS income information.
- ☐ The student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA, and the student will submit to the school a **2024 IRS tax return transcript** or a signed copy of the income tax return. **To obtain an IRS tax return transcript, go to www.irs.gov/Individuals/Get-Transcript or call 1-800-908-9946 for assistance.**
- ☐ **Check here if the student's IRS tax return transcript is attached to this worksheet.**
- ☐ **Check here if the student's IRS tax return transcript will be submitted to the student's school later.**

D. Parent's Income Information (for Dependent Students)

1. **TAX RETURN NON-FILERS** – Complete this section if the parent will not file and is not required to file a 2024 income tax return with the IRS. Check the box that applies:
- ☐ The parent was not employed and had no income earned from work in 2024.
 - ☐ The parent was employed in 2024 and has listed below the names of all parents' employers, the amount earned and whether an IRS W-2 form is attached. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page.*

Employer's Name	2024 Amount Earned	IRS W-2 Attached?
Suzy's Auto Body Shop (example)	\$2000.00 (example)	Yes (example)

2. **TAX RETURN FILERS** – **Important Note:** If the parent filed, or will file, an amended 2024 IRS tax return, the parent must contact the financial aid office before completing this section.

Check the box that applies:

- ☐ The parent has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2024 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA.
- ☐ The parent has not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2024 IRS income information.

☐ The parent is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA, and the parent will submit to the school a **2024 IRS tax return transcript** or a signed copy of the income tax return. **To obtain an IRS tax return transcript, go to www.irs.gov/Individuals/Get-Transcript or call 1-800-908-9946 for assistance.**

☐ **Check here if the parent's IRS tax return or transcript is attached to this worksheet**

☐ **Check here if the parent's IRS tax return or transcript will be submitted to the student's school later.**

E. Child Support Payments

☐ **Check here if you or anyone else in Section B of this worksheet PAID child support in 2024. Please provide information below.**

Name of person who paid Child Support	Name of person to whom Child Support was paid	Name of child for whom Child Support was paid	Amount of Child Support paid in 2024
Marty Jones (example)	Chris Smith (example)	Terry Jones (example)	\$6000.00 (example)

☐ **Check here if child support was RECEIVED in 2024 for any of the children in your household. Please provide information below.**

Name of Adult who received the Child Support	Name of Child for whom Support was received	Amount of Child Support received in <u>2024</u>
Marty Jones (example)	Chris Smith (example)	\$6000.00 (example)

F. High School Completion Status

Submit your high school transcript that includes a graduation date. If your graduation is pending please wait until after your graduation occurs. Mark the box of the type of document you will be submitting.

☐ Transcript with graduation date has already been submitted to Southern Adventist University's Admissions Office

OR

☐ Copy of the student's high school diploma

☐ Copy of the high school transcript that included the date the high school diploma was awarded

☐ A secondary school completion credential for home school provided for under State Law

☐ Transcript or the equivalent, signed by the parent or guardian responsible for homeschooling, that lists the secondary school courses completed by the applicant and documents the completion of a secondary school education

☐ General Education Developmental Certificate (GED)

☐ Certificate recognized by the state as an equivalent to a diploma

☐ Academic transcript that shows completion of at least a two-year program acceptable for credit towards a BS degree

G. Statement of Educational Purpose

Do not complete this section in advance. This section must be completed and signed:

- *In the presence of an approved representative of the Financial Aid Office if you are submitting this paperwork in person to the Financial Aid Office; or*
- *In the presence of a Notary Public if you are not submitting this paperwork to the Financial Aid Office*

Identity and Statement of Educational Purpose (Complete only if signing in the Financial Aid Office)

You must appear in person at Southern Adventist University to verify your identity by presenting a 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 your photo ID that is annotated with the date it was received and the name of the official at the institution authorized to collect your ID.

In addition, you must sign, in the presence of the institutional official, the following:

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of 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 Southern Adventist University for the academic school year.

Student's Signature

Student ID #

Date

(Complete only if signing in the Financial Aid Office)

If you are unable to appear in person at Southern Adventist University to verify your identity you must provide:

- A copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a driver's license, other state-issued ID, or passport; and
- The original notarized Statement of Educational Purpose provided below.

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of 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 Southern Adventist University for the academic school year.

Student's Signature	Student ID #	Date
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Notary's Certificate of Acknowledgement

State of _____

City/County of _____

On _____, before me, _____,
(Date) (Notary's Name)
 personally appeared, _____, and provided to me on basis of satisfactory
(Printed name of signer)
 evidence of identification _____ to be the above-named person who signed
(Type of ID provided)
 the foregoing instrument.

WITNESS my hand and official seal
(seal)

(Notary signature)

My commission expires on _____
(Date)

H. Certifications and Signatures

Each person signing this form certifies that all the information reported on it is complete and correct. The student and at least one parent (if student is dependent) must sign and date. **WARNING: If you purposefully give false or misleading information on this worksheet, you may be fined, be sentenced to jail or both.**

Student	Date	SAU ID #
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Parent _____ (dependent students only) Date _____