Federal Verification Worksheet – Independent Student 2023-2024

Please see the reverse for instructions and contact us if you have any questions about Federal Verification.

Step 1 – Student Information

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>MI</th>
<th>Wake Forest Student ID #</th>
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<tr>
<th>Address (include apt. no.)</th>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
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Step 2 – Household Information (including all household members, whether or not they are enrolled in college)

In the chart below include the Full Name, Age, and Relationship of:

- Yourself.
- Your spouse if you are married.
- Your or your spouse’s children, if you or your spouse will provide more than half of the child’s support from July 1, 2023 through June 30, 2024 or if the child would be required to provide your information if they were completing a FAFSA® for 2023-2024. Include children who meet either of these standards, even if they do not live with you.
- Other people only if they now live with you and you or your spouse 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.

Provide college information for those students attending at least half-time during 2023-2024 in a program leading to a degree, diploma, or certificate.

<table>
<thead>
<tr>
<th>Full Name of Household Member</th>
<th>Age</th>
<th>Relationship</th>
<th>Name of College</th>
<th>Undergraduate/ Graduate Level</th>
<th>Half-Time/ Full-Time</th>
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<tbody>
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<td>Wake Forest University</td>
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Step 3 – Student’s Tax Filing Status – Calendar Year 2021

Have you or will you, or your spouse, be required to file a 2021 U.S. income tax return (or similar non-U.S. national government form)? Please notify us if you or your spouse filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.

☐ NO Complete and submit the Student Non-Tax Filer Certification

AND

submit a Verification of Non-filing Letter.

Request from the IRS a Verification of Non-filing letter for tax year 2021 at (irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them). When the letter is received by the student (and spouse if appropriate), then the student (and spouse if appropriate) must provide a copy to Student Financial Aid, noting the student’s full name and Wake Forest Student ID#.

☐ YES Please check one of the three additional boxes below. The best way to verify income is by using the IRS Data Retrieval Tool (DRT) that is part of the FAFSA®. In most cases, no further documentation is needed to verify income if IRS DRT information was not changed by the FAFSA® filer and no amended return was filed. Please check the box that applies:

☐ The student has used the IRS DRT in the FAFSA® to transfer the student’s (and spouse’s if appropriate) 2021 IRS income tax return information into the student’s FAFSA®.

☐ The student has not yet used the IRS DRT in the FAFSA® to transfer the student’s (and spouse’s if appropriate) 2021 IRS income tax return information into the student’s FAFSA® but will do so.

☐ The student is unable or chooses not to use the IRS DRT in the FAFSA® and instead will provide to Student Financial Aid the student’s (and spouse’s if appropriate) 2021 IRS Tax Return Transcript OR a signed copy of the 2021 income tax return and applicable schedules. (Request from the IRS a Tax Return Transcript for tax year 2021 at (irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them). When the transcript is received by the student (and spouse if appropriate), then the student (and spouse if appropriate) must provide a copy to Student Financial Aid, noting the student’s full name and Wake Forest Student ID#.)

Please see the reverse side for additional information and certification.
Important Information about Federal Verification

Your federal student aid application (FAFSA®) has been selected by the U.S. Department of Education for its verification process. For independent students, information to be verified relates to you and your spouse, if married. Please note carefully the documentation required to verify this information listed above. You must complete and return the Federal Verification Worksheet and all other required documentation to avoid cancellation of your Federal Student Aid.

For 2023-2024, information to be verified includes (1) number of household members; and (2) number of household members 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. For 2021 federal income tax return filers, additional income-related information to be verified includes adjusted gross income, U.S. income tax paid, untaxed IRA distributions, untaxed pensions, education credits, IRA deductions, and tax-exempt interest income. Income earned from work must be verified for non-filers of U.S. income tax returns.

The best way to verify income is by using the IRS Data Retrieval Tool (DRT) that is part of the FAFSA®. In most cases, no further documentation is needed to verify income if IRS DRT information was not changed by the FAFSA® filer and no amended return was filed.

For Federal Pell Grant eligible students whose application has been selected for verification, verification must be completed by a deadline published annually in the Federal Register (generally in September following the academic year), or no later than 180 days after the last day of enrollment during the academic year, whichever date comes first. Verification must be completed for campus-based (Federal Supplemental Educational Opportunity Grants (SEOG) and Federal Work-Study) and Federal Direct Loan eligible students by the last day of enrollment during the academic year. Failure to complete verification will result in cancelation of Federal Student Aid.

If a FAFSA® transaction is selected for verification after Federal Student Aid eligibility has already been determined and/or disbursed, and requested verification documents are not provided, any undisbursed aid will be canceled. No additional federal funds will be disbursed until verification has been completed.

If verification causes a change in the student’s eligibility for Federal Student Aid funds, the student will receive a revised aid notification via email. The student may review her/his modified financial aid eligibility by accessing her/his financial aid record through the Student Financial Aid Portal.

Certification

Each person signing this worksheet certifies that all the information reported on it is complete and correct. The student and spouse, if married, must sign and date.

Wake Forest University cannot accept electronic signatures.

Student’s Signature _____________________________ Date _______________

Spouse’s Signature _____________________________ Date _______________