

Please see the reverse for important information and contact us if you have any questions about Federal Verification. Return this form to finaid@wfu.edu. We appreciate your careful attention and prompt reply.

Step 1 – Student Information

Last Name	First Name	MI	Wake Forest Student ID #	
Address (include apt. no.)		City	State	Zip Code

Step 2 – Family Size Clarification

The instructions below correspond to the FAFSA® definition of family size.

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

- **Self**
- **Legal Parent(s):** Biological/adoptive, or as determined by the state.
 - If legal parents are married, include both parents.
 - If legal parents are unmarried and live together, include both parents.
 - If legal parents are unmarried and do not live together, include only the parent who provides the greater portion of the student's financial support (even if the student does not live with that parent). If that legal parent has remarried, also include his/her spouse (the student's stepparent).
 - If legal parents are divorced or separated, include only the parent who provides the greater portion of the student's financial support (even if the student does not live with that parent). If that legal parent has remarried, also include his/her spouse (the student's stepparent).
 - If legal parent is widowed and not remarried, include only that parent.
 - If legal parent was widowed and has remarried, also include his/her spouse (the student's stepparent).
- **Children**
 - For the FAFSA® parent(s) that you have listed in the chart below, include their dependent children and stepchildren (even if they live apart because of college enrollment, illness, education, business, vacation, military service, juvenile detention, or other circumstances), if your FAFSA® parent(s) will provide more than half of their support between July 1, 2025 and June 30, 2026.
- **Other People** only if they now live with your FAFSA® parent(s) and your FAFSA® parent(s) will provide more than half of their support between July 1, 2025 and June 30, 2026.

List all members of your FAFSA® family below, based on the definitions above. If additional space is needed, please continue on a separate sheet.

Full Name of FAFSA® Family Member	Age	Relationship
		Self

Step 3 – Student's Tax Filing Status – Calendar Year 2023

Did you file, or were you required to file, a 2023 U.S. income tax return (or a similar non-U.S. (eg: foreign) national government income tax form)?

- ☐ **NO** Complete and submit the **Student Nontax-Filer Certification**.
- ☐ **YES** In most cases, no further documentation is needed to verify 2023 U.S. income tax return data that was imported from the IRS to the FAFSA®.

If your 2023 U.S. income tax return information was not available to import to your FAFSA® via the IRS import process or could not be used, please provide either:

- (1) a signed copy of your (student's) 2023 U.S. income tax return and applicable schedules (1, 2, and 3) if not already previously provided via the College Board's IDOC service, or
- (2) your 2023 IRS Tax Return Transcript. (You should request from the IRS a **Tax Return Transcript** for tax year 2023 at irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them). When you receive the transcript, provide a copy to Student Financial Aid, noting your full name and Wake Forest Student ID#.)

In addition, if you filed an amended 2023 IRS Tax Return, you must also provide a signed copy of your 2023 IRS Form 1040X "Amended U.S. Individual Tax Return" that was filed with the IRS, or documentation from the IRS that includes the change(s) made by the IRS.

If you filed a 2023 national income tax return with a taxing authority other than the IRS, please provide a signed copy of that tax return that was filed with the relevant taxing authority (foreign government, etc.).

Step 4 –Parent(s)' Tax Filing Status – Calendar Year 2023

Did your parents file, or were they be required to file, a 2023 U.S. income tax return (or similar non-U.S. (eg: foreign) national government income tax form)?

- ☐ **NO** Complete and submit the **Parent Nontax-Filer Certification**.
In addition, if your parents were subject to foreign (non-U.S.) government income taxation during 2023, they must provide Confirmation of Nonfiling from the relevant (eg: foreign, Puerto Rico, etc.) taxing authority. A Confirmation of Nonfiling document is required even for zero income.
- ☐ **YES** In most cases, no further documentation is needed to verify 2023 U.S. income tax return data that was imported from the IRS to the FAFSA®.

If your parents' 2023 U.S. income tax return information was not available to import to your FAFSA® via the IRS import process or could not be used, please provide either:

- (1) a signed copy of your parents' 2023 U.S. income tax return and applicable schedules (1, 2, and 3) if not already previously provided via the College Board's IDOC service, or
- (2) a 2023 IRS Tax Return Transcript of your parents' information. (Your parents should request from the IRS a **Tax Return Transcript** for tax year 2023 at irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them). When your parents receive the transcript, provide a copy to Student Financial Aid, noting the student's full name and Wake Forest Student ID#.)

In addition, if your parents filed an amended 2023 IRS Tax Return, you must also provide a signed copy of their 2023 IRS Form 1040X "Amended U.S. Individual Tax Return" that was filed with the IRS, or documentation from the IRS that includes the change(s) made by the IRS.

If your parents filed a 2023 national income tax return with a taxing authority other than the IRS, please provide a signed copy of that tax return that was filed with the relevant taxing authority (foreign government, etc.).

Important Information about Federal Verification

Your federal student aid application (FAFSA®) has been selected by the U.S. Department of Education for its federal verification process. For dependent students, information to be verified relates to the student and to their parent(s). You must complete and return the Federal Verification Worksheet and all other required documentation. 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 cancellation 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. 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 one parent must sign and date. **Wake Forest cannot accept electronic signatures.**

Student's Signature

Date

Parent's Signature

Date