

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**
- **Spouse**
- **Children**
 - Include your dependent children (even if they live apart because of college enrollment, illness, education, business, vacation, military service, juvenile detention, or other circumstances), if you will provide more than half of their support between July 1, 2025 and June 30, 2026.
- **Other People**
 - Include other people only if they now live with you and you 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

(please continue on reverse side)

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

Did you (and your spouse, if applicable) file, or were you (and your spouse, if applicable) required to file, a 2023 U.S. income tax return (or similar non-U.S. (eg: foreign) national government income tax form)? Please notify us if you or your spouse filed separate IRS income tax returns for 2023 or had a change in marital status after December 31, 2024.

- ☐ **NO** Complete and submit the **Student Nontax-Filer Certification**
In addition, if you (or your spouse, if applicable) were subject to foreign (non-U.S.) government income taxation during 2023, your (and your spouse, if applicable) 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 (or your spouse's, if applicable) 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) and your spouse's (if applicable) 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 (and your spouse's, if applicable) 2023 IRS Tax Return Transcript. (You (and your spouse, if applicable) 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(s), provide a copy to Student Financial Aid, noting your full name and Wake Forest Student ID#.)

In addition, **if you (or your spouse, if applicable) filed an amended 2023 IRS Tax Return**, you (and your spouse, if applicable) must also provide a signed copy of your (student's) and your spouse's if applicable, 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 (or your spouse, if applicable) 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 spouse, if married, must sign and date.

Wake Forest University cannot accept electronic signatures.

Student's Signature

Date

Spouse's Signature

Date