<table>
<tr><td>
Baptist University of Florida
Financial Aid Office
5400 College Drive
Graceville, Florida 32440
1-800-328-2660 Ext. 461
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Independent
Verification Worksheet (V5)
2023-2024

V5

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law states that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid office at Baptist University of Florida. We may ask for additional information.

PLEASE READ ALL INSTRUCTIONS CAREFULLY. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

Student Information

Student's Name: _____
First   M.I.   Last

Date of Birth: _____   Social Security Number:_____

Home Phone: _____   Cell Phone:_____

Work Phone: _____   Email: _____

Address _____
Street/P.O. Box   City   State   Zip Code

Family Information

List below the people in the <u>student's household</u>. Include:
- The student.
- 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 their support from July 1, 2023, through June 30, 2024, even if the children do not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of their support and will continue to provide more than half of their support through June 30, 2024.

Include the name of the college for any household member who will be enrolled <u>at least half time</u> in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2023 and June 30, 2024. If more space is needed, provide a separate page with the student's name and Social Security Number at the top.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		Self		

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

Verification of 2021 IRS Income Tax Return Information for Student <u>Tax Filers</u>

Important note: The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021. **Instructions**: Complete this section if the student <u>filed or will file</u> a 2021 IRS Income Tax Return(s). The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at <u>FAFSA.gov</u>. In most cases, no further documentation is needed to verity 2021 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

☐ The student <u>has used</u> the IRS DRT in FAFSA on the Web to transfer 2021 IRS income tax return information into the student's FAFSA.

☐ The student <u>has not yet used</u> the IRS DRT in FAFSA on the Web, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA.

☐ The student is <u>unable or chooses not to use</u> the IRS DRT in FAFSA on the Web, and instead will provide the school a **2021 IRS Tax Return Transcript(s), or a signed copy of the 2021 income tax return and applicable schedules.**

A 2021 IRS Tax Return Transcript may be obtained through:

- <u>Get Transcript by Mail</u> – Go to <u>www.IRS.gov</u> and 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.
- <u>Get Transcript Online</u> – Go to <u>www.IRS.gov</u> and 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.
- <u>Automated Telephone Request</u> – 1-800-908-9946. Transcripts is generally received within 10 business days from the IRS's receipt of the telephone request.
- <u>Paper Request Form</u> – IRS Form 4506T-EZ or 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 2021 IRS income tax returns, the IRS DRT cannot be used and the **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** must be provided for each.*

☐ Check here if a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** is provided.

☐ Check here if a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** will be provided later.

Verification of 2021 Income Information for Student <u>Nontax Filers</u>

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse will not file and <u>are not required</u> to file a 2021 income tax return with the IRS.

Check the box that applies:

☐ The student was not employed and had no income earned from work in 2021.

☐ The student's spouse (if married) was not employed and had no income earned from work in 2021.

☐ The student and/or spouse were employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form or equivalent document is provided. [Provide copies of all 2021 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

If more space is needed, provide a separate page with the student's name and Social Security Number at the top.

Employer's Name	IRS W-2 or Equivalent Document Provided?	Annual Amount Earned in 2021
Suzy's Auto Body Shop (example)	*Yes*	*$4,500.00*

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2021 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority, or a signed statement certifying that the individual attempted to obtain confirmation of nonfiling from the IRS or other relevant tax authority and was unable to obtain the required documentation.

☐ Check here if confirmation of nonfiling or a signed statement is provided.

☐ Check here if confirmation of nonfiling or a signed statement will be provided later.

A student who is unable to obtain the documentation listed above must contact the financial aid office.

Identity and Statement of Educational Purpose

The student must appear in person at Baptist University of Florida Financial Aid Office 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 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 Baptist University of Florida Financial Aid Office, the **Statement of Educational Purpose** below.

If the student is unable to appear in person at Baptist University of Florida Financial Aid Office 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 acknowledge 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 Educational Purpose and
                        (Print Student's Name)
that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Baptist University of Florida for 2023-2024.

_____ _____ _____
(Student's Signature)   (Date)   (Student's ID#)

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 evidence of
                                   (Printed name of signer)

identification _____ to be the above-named person who signed the foregoing instrument.
        (Type of government-issued photo ID provided)

WITNESS my hand and official seal
          (seal)   _____ My commission expires on _____
                                   (Notary signature)   (Date)

FOR OFFICE USE ONLY: Attach photocopy of ID after verifying identity.

Document Used: _____Date Received: _____ Authorized Name:_____

Certifications and Signatures

WARNING: If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.

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

_____ _____
Print Student's Name   Student's ID Number

_____ _____
Student's Signature (Required)   Date

_____ _____
Spouse's Signature (Optional)   Date