

Shepherd University 2023-2024 Verification: V5 Aggregate

Your 2023 – 2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. To verify you have provided correct information, we will compare your FAFSA with the information on this institutional verification document and any other required documents. If there are differences, your FAFSA information may need to be corrected and/or we may ask for additional information. If you have questions, contact the Office of Financial Aid as soon as possible so your financial aid will not be delayed. **Your financial aid cannot be packaged until verification is complete.**

Student's First Name

Student's Last Name

Student's First Name

Student's M.I.

Student's Shepherd ID Number

Student's Phone Number

Student's Date of Birth

Step 1: Household Size

Select your financial aid student classification (independent/dependent) based upon what was required on the FAFSA.

☐ **DEPENDENT**

☐ **INDEPENDENT**

If you **were** required to include parent information on the FAFSA, you must include:

- Yourself (student)
- Your parent(s), including stepparent
- Your parents' other children, even if they don't live with your parent(s), if (a) your parents will provide *more than half of their support* from July 1, 2023 through June 30, 2024, or (b) the children would be required to provide parental information when applying for Federal Student Aid
- Other people if they now live with your parents, and your parents 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

If you **were not** required to include parent information on the FAFSA, you must include:

- Yourself (student)
- Your spouse, if you are married
- Your or your spouse's children if you or your 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 you
- Other people 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

List everyone in your household using the table below:

[illegible]

Step 2: Student (and Spouse) Tax and Income Information

Check only one of the boxes below then submit the corresponding documents requested.	Must submit the following documents
<input type="checkbox"/> I have or will file a 2021 Federal Income Tax Return and will submit the information by using the: <ul style="list-style-type: none"> <input type="checkbox"/> FAFSA IRS Data Retrieval Tool <input type="checkbox"/> 2021 Tax Return Transcript <input type="checkbox"/> 2021 Signed 1040 Tax Return 	Once tax returns are filed, update your FAFSA by using the IRS Data Retrieval Tool if eligible, OR send us your 2021 Tax Return Transcript . You may order an IRS Tax Return Transcript at www.irs.gov/Individuals/Get-Transcript or by calling 1-800-829-1040. A HAND-SIGNED copy of your tax return or 1040 is acceptable.
<input type="checkbox"/> I worked in 2021 but am not required to file a 2021 Federal Income Tax Return.	-2021 W-2 Form(s) or other earnings statements from your employer(s). This includes any W-2s received from Work Study. -Letter of Non-filing Status from IRS for Independent Students. Can be obtained from the IRS using Form 4506-T and checking Box 7.
<input type="checkbox"/> I did not work in 2021 and am not required to file a 2021 Federal Income Tax Return.	-Letter of Non-filing Status from IRS for Independent Students. Can be obtained from the IRS using Form 4506-T and checking Box 7.

Step 3: Parent(s) Tax and Income Information - Complete if parent information was required on FAFSA

Check only one of the boxes below then submit the corresponding documents requested.	Must submit the following documents
<input type="checkbox"/> I have or will file a 2021 Federal Income Tax Return and will submit the information by using the: <ul style="list-style-type: none"> <input type="checkbox"/> FAFSA IRS Data Retrieval Tool <input type="checkbox"/> 2021 Tax Return Transcript <input type="checkbox"/> 2021 Signed 1040 Tax Return 	Once tax returns are filed, update your FAFSA by using the IRS Data Retrieval Tool if eligible, OR send us your 2021 Tax Return Transcript . You may order an IRS Tax Return Transcript at www.irs.gov/Individuals/Get-Transcript or by calling 1-800-829-1040. A HAND-SIGNED copy of your tax return or 1040 is acceptable.
<input type="checkbox"/> I worked in 2021 but am not required to file a 2021 Federal Income Tax Return.	-2021 W-2 Form(s) or other earnings statements from your employer(s). This includes any W-2s received from Work Study. -Letter of Non-filing Status from IRS. Can be obtained from the IRS using Form 4506-T and checking Box 7.
<input type="checkbox"/> I did not work in 2021 and am not required to file a 2021 Federal Income Tax Return.	-Letter of Non-filing Status from IRS. Can be obtained from the IRS using Form 4506-T and checking Box 7.

Step 4: Certification and Required Signatures

Each person signing below certifies that all of the information reported is complete and correct. **(Must be physically signed with a pen. Electronic signatures are NOT acceptable.)**

_____ Student Signature	_____ Printed Student Name	_____ Date
_____ Parent Signature (if dependent)	_____ Printed Parent Name	_____ Date

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

Step 5: Statement of Educational Purposes

This form must be completed IN-PERSON either in the Office of Financial Aid, or in the presence of a notary and physically returned to the Office of Financial Aid. Electronic copies/signatures are not acceptable. Please present a valid government-issued photo ID for the process. Your financial aid cannot be packaged until verification is complete. **We are required to notify the Department of Education of these results within 60 days of sending you this form. Please attempt to complete and return it within 50 days.**

Student's Shepherd ID Number

OPTION #1: To be completed in the presence of the Office of Financial Aid

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 Shepherd University for 2023-2024.
(Print Student's Name)

Student's Signature

Date

Office of Financial Aid's Certificate of Acknowledgement

On _____, before me, _____,
(Date) (Financial Aid Advisor's name)

personally appeared, _____, and proved to me on basis of satisfactory
(Printed name of signer)

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

the foregoing instrument.

(Financial Aid Advisor's signature)

OPTION #2: To be completed in the presence of a notary

Student's Shepherd ID Number

If you are unable to appear in person at Shepherd 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
(Print Student's Name)
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 Shepherd University for 2023-2024.

Student's Signature

Date

Notary's Certificate of Acknowledgement

State of _____ City/County of _____

On _____, before me, _____,
(Date) (Notary's name)

personally appeared, _____, and proved to me on basis of satisfactory
(Printed name of signer)

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

the foregoing instrument.

WITNESS my hand and official seal

(seal)

(Notary's signature)

My commission expires on _____
(Date)

Return to:
Shepherd University Office of Financial Aid
P.O. Box 5000, Shepherdstown, WV 25443-5000

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