

20142015 VERIFICATION WORKSHEET FEDERAL STUDENT AID PROGRAMS (Verification Groups V1-V6, or Institution selected)

Your application was selected by the U.S. Dept. of Education for review in a process called "verification". In this process, we are required by federal law (34 CFR, Part 668) to compare the information from your application with the information provided on this form and with a transcript of your 2013 federal tax forms (and your spouse's if you are married, for federal aid purposes). If there are differences between your application and the documents you've submitted, corrections may be needed. **We cannot process your financial aid until verification has been completed; please provide the required documents within 15 days of receipt.**

What you must do before financial aid can be awarded to you:

1. Please file your 2013 Federal tax return as soon as possible. We are unable to confirm your final aid eligibility until all verifications requirements are met.
2. Once your tax return has been processed, please return your FAFSA and authorize the IRS Data Retrieval (IRS DRT) or obtain an official IRS Tax Return transcript to complete the verification process. We will no longer be allowed to accept copies of the Federal Tax Return.
3. You (and your spouse, if applicable) must complete and sign this worksheet and return it to our office as soon as possible.
4. Contact Saybrook University Financial Aid Department if you have questions about this form.

A. Independent Student information

Student's Last Name	First Name	M.I.	Social Security Number
Student's Street Address (Include apt. no.)			Student's Date of Birth
City	State	Zip Code	Student's Email Address
Student's Home Number (include area code)			Student's Alternate or Cell Phone Number

B. Family Information

List the people in your household include *(Should match FAFSA responses to questions 95 and 96):*

- You and your spouse
- Your children if you will provide more than half of their support from July 1, 2014 through June 30, 2015 even if they don't live with you.
- Other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2014 through June 30, 2015.

Write the names of all household members; including yourself!: Write in the name of the college for any family member, other than your parent(s), who will be going to college at least half-time from July 1, 2014 through June 30, 2015 and will be enrolled in a degree, diploma or certificate program. Attach a separate page for additional names and include your name at the top of the page. We may require additional documentation if we have reason to believe this information is incorrect.

FULL NAME	AGE	RELATIONSHIP	COLLEGE ATTENDING IN 2014/2015
Marvin Johnson (example)	19	Self	Saybrook University

C. INDEPENDENT STUDENT'S INCOME INFORMATION TO BE VERIFIED—You must complete 1.a or 1.b. AND Section 2

1. **a. If you have or will file a Tax Return:** Complete this section if the student filed or will file a 213 income tax return with the IRS. The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web. If the student has not already used the tool, go to FAFSA.gov, log in to the student's FAFSA record, select "make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student is eligible to use the IRS DRT to transfer 2013 IRS income tax information into the student's FAFSA.

Check the box that applied:

The student has used the IRS DRT in FAFSA on the Web to retrieve and transfer 2013 income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. If you used the IRS DRT but subsequently made changes, please attach a statement indicating why the information that you submitted is more accurate than information from the IRS Database.

The student has not yet used the IRS DRT in FAFSA on the Web, but will use the tool to retrieve and transfer 2013 IRS income information into the student's FAFSA once the student has filed a 2013 IRS tax return.

_____ Check here if you will file taxes by April 15, 2014 and subsequently complete the FAFSA IRS DRT Retrieval process.

_____ Check here if you are filing a tax extension. **Important Note:** You must submit a copy of your IRS Extension form 4868, W-2 and/or 1099 forms and, if self-employed, a signed statement certifying the amount of the individual's AGI and the U.S. Income Tax Paid for tax year 2013.

If the student filed taxes and is unable or chooses not to use the IRS DRT in FAFSA on the Web, and the student will submit to the school a **2013 IRS Tax Return transcript**- a photocopy of the income tax return can no longer be accepted. To obtain an IRS Tax Return transcript, go to www.irs.gov and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Do NOT send IRS Form 4506 to Saybrook University, you must submit it directly to the IRS.

_____ Check here if the student's **IRS Tax Return transcript is attached to this worksheet.**

or

b. If you will NOT file a Tax Return: Complete this section if the student will not file and is not required to file a 2013 income tax return with the IRS. **Check the box that applies:**

The student (and spouse, if applicable) was not employed and had no income earned from work in 2013. Proceed to item 2.

The student (and spouse if applicable) was employed in 2013 and has listed below the names of all the student's (and spouse's) employers, the amount earned from each employer in 2013, and whether an IRSA W-2, or 1099 form is attached. Attach copies of all 2013 IRS W-2/1099 forms issued to the student (and spouse) by employers. List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name at the top of the page.

If you did NOT file a tax return but did work, please complete the table below

Employer's Name	2013 Amount Earned	IRS W-2/1099 Attached?
<i>Darnel's Coffee Shop (example)</i>	<i>\$2,000 (example)</i>	<i>Yes (example)</i>

2. List all of the student's (and spouse's) untaxed income and current asset value information (see FAFSA line 41-45): **You must complete all fields with an amount, even if the amount is zero. If any field is left blank, marked with a line, or marked "N/A" we will consider the form incomplete and it will delay verification.**

Sources of Untaxed Income	2013 Annual Amount	Assets (Do not include value of primary residence or defined retirement accounts)	Net Value
a. Payments to tax-deferred pension and retirement savings plans	\$	h. Total of cash, savings, checking	\$
b. Untaxed Pensions/IRA Distributions	\$	i. Net worth of investments	\$
c. Child Support Received	\$	j. Net worth of current business	\$
d. Military/Clergy living allowances	\$	k. Net worth of investment farm	\$
e. Veterans non-education benefits	\$		
f. Other untaxed income	\$		
g. Money paid/received on your behalf	\$		

D. OTHER INFORMATION TO BE VERIFIED: Complete this section only if someone in the student's household (listed in section B) received SNAP benefits (food stamps) or made Child Support payments. If asked by the school, you will provide documentation of SNAP benefits and/or the payment of child support. If either section is not applicable to your Verification group, skip to Section F.

1. Complete this section only if someone in the student's household received benefits from the Supplemental Nutrition Assistance Program (SNAP) or other food stamps program at any time during the 2012 or 2013.

One of the persons listed in Section B of this worksheet received SNAP benefits in 2012 or 2013. 2.

2. Complete this section if the student (or spouse) paid child support in 2013 due to divorce, separation, or as a result of a legal requirement.

The student or spouse **PAID (not received)** child support in 2013. The student has indicated below the name of the person who paid the child support, the name of the person to whom the child support was paid, the names of the children for whom child support was paid, and the total annual amount of child support that was paid in 2013 for each child. If you need more space, attach a separate page that includes the student's name at the top of the page.

If child support has been PAID, please provide complete information below

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Amount of Child Support Paid in 2013
Marty Jones	Chris Smith (example)	Terry Jones	\$6,000

E. CERTIFICATION AND SIGNATURES: The student (and spouse, if applicable) must sign and date.

Please sign and date at the bottom of the form to affirm that you acknowledge and understand that:

- Each person signing this worksheet certifies that all of the information reported on it is complete and correct.
- You must complete the FAFSA IRS DRT or submit a copy of your IRS Tax Return transcript when you file Federal taxes for verification to be considered complete.
- Verification must be completed before your Financial Aid Award Offer is finalized and before financial aid can be credited towards your Saybrook University charges.
- If you later make tax return corrections, you agree to notify the Saybrook University Financial Aid Office and submit a signed copy of the 1040X as well as the IRS Tax Return transcript, to supplement your current verification materials.
- Adjustments to your financial aid eligibility may be required due to the results of this verification process, which may change the sources and amounts of your Financial Aid Award Offer.
- If you have submitted proof of a tax extension, you agree to complete the on line FAFSA IRS DRT or submit a 2013 IRS Tax Return transcript to the financial aid office **no later than December 1, 2014** to avoid cancelation of any disbursed and/or pending financial aid for the 2014/2015 academic year. You acknowledge that you will be responsible for repayment of any disbursed aid that is canceled due to your failure to meet the December 1st deadline.

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

Student's Signature

Date

Spouse's Signature

Date

Identity/Statement of Educational Purpose

The student must appear in person at _____ to
(Name of Postsecondary Educational Institution)
verify his or her identity by presenting 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 the name of the official at the institution authorized to collect the student's ID.

In addition, the student must sign, **in the presence of the institutional official**, the following:

Statement of Educational Purpose

I certify that I _____ am the individual signing this
(Print Student's Name)

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 _____ for 2013-2014.

(Name of Postsecondary Educational Institution)

(Student's Signature) (Date)

(Student's ID Number)

The above statement must be signed in the presence of a notary if the student is unable to appear in person at _____ to verify his or her identity; the student must provide:

(Name of Postsecondary Educational Institution)

- (a) 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
- (b) The original notarized Statement of Educational Purpose provided below.

Notary's Certificate of Acknowledgement

State of _____

City/County of _____

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

personally appeared, _____, and provided to me
(Printed name of signer)

on basis of satisfactory evidence of identification _____
(Type of government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal

(seal)

(Notary signature)

My commission expires on _____
(Date)

PLEASE RETURN THIS FORM, VIA FAX TO: 415/433/9271

OR POSTAL MAIL TO:

SAYBROOK UNIVERSITY
FINANCIAL AID OFFICE
747 FRONT STREET, 3RD FLOOR
SAN FRANCISCO, CA 94111
OFFICE PHONE#: 415-394-5350