



## 2025-2026 Independent Verification Worksheet

Your Free Application for Federal Aid (FAFSA) was selected for review in a process called verification. Before awarding Federal Student Aid, we must ask you to confirm the information you reported on your FAFSA. We will compare your FAFSA with the information you report on this and any other required documentation. If there are differences, your FAFSA information may need to be corrected. Contact our office if you have any questions regarding this form at 510.879.9200 Submit this completed form with any required documents to the Financial Aid Office by email to: [FinAid@samuelmerritt.edu](mailto:FinAid@samuelmerritt.edu).

### A. Student Name : (please print)

|             |               |                |
|-------------|---------------|----------------|
| Last Name   | First Name    | Middle Initial |
| Address     | City, State   | ZIP            |
| Student ID# | Date of Birth | Phone Number   |

### B. Family Size (Include):

- Yourself
- Your spouse if you are married
- Your children if the following are true:
  - They live with you (or live apart because of college enrollment)
  - You provide more than half of your children's support and will continue to provide more than half of your children's support during the award year.
- List any other people if the following are true:
  - They live with you
  - You provide more than half of their support and will continue to provide more than half of their support during the award year.

| Full Name | Age | Relationship | College | Will be Enrolled at least Half-Time (Yes or No) |
|-----------|-----|--------------|---------|---|
|           |     |              |         |   |
|           |     |              |         |   |
|           |     |              |         |   |
|           |     |              |         |   |
|           |     |              |         |   |
|           |     |              |         |   |
|           |     |              |         |   |

**C. Student Tax Information:**

\_\_\_\_\_ Check here if you have used the IRS Data Retrieval Tool and the information is unchanged.

\_\_\_\_\_ Check here if you are providing a 2023 IRS Tax Return Transcript or a signed copy of the 2023 income tax return and applicable schedules.

\_\_\_\_\_ Check here if you will not file and are not required to file a 2023 U.S. Income Tax return. If not filing, please complete a Non-Tax Filer Form found at:

<https://www.samuelmerritt.edu/admission/affording-smu/financial-aid-and-scholarships>

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**D. Spouse's Tax Information:**

\_\_\_\_\_ Check here if you have used the IRS Data Retrieval Tool and the information is unchanged.

\_\_\_\_\_ Check here if you are attaching a 2023 IRS Tax Return Transcript or a signed copy of the 2023 income tax return and applicable schedules.

\_\_\_\_\_ Check here if you will not file and are not required to file a 2023 U.S. Income Tax return. If not filing, please complete a Non-Tax Filer Form found at:

<https://www.samuelmerritt.edu/admission/affording-smu/financial-aid-and-scholarships>

**A 2023 IRS Tax Return Transcript may be obtained through:**

- **Get Transcript by Mail** – Go to [www.irs.gov](http://www.irs.gov), 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.
- **Get Transcript Online** – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." Follow the instructions to create an ID.me account if you do not already have one. If you need help creating an ID.me account or verifying your identity, visit the [ID.me IRS Help Site](https://www.id.me).
- **Automated Telephone Request** – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

### Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2023 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2023 must provide:

- A signed statement listing the sources of any 2023 income and the amount of income from each source;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2023;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2023; and
- If self-employed, a signed statement certifying the amount of the individual's adjusted gross income (AGI) and the U.S. income tax paid for tax year 2023.

### Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2023 must provide a signed copy of the 2023 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that includes the change(s) made by the IRS, in addition to one of the following:

- Income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
- A **2023 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS.

### Signatures:

Each person signing this form certifies that all the information reported on is complete and correct. The student must sign this worksheet. If married, the spouse's signature is optional.

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

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Student \_\_\_\_\_ Date \_\_\_\_\_

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Spouse \_\_\_\_\_ Date \_\_\_\_\_