



Samuel Merritt University

2026-2027 Independent Verification Worksheet

Verification Group (VI)

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. You and your spouse whose information was reported on the FAFSA must complete and sign this worksheet and submit it to our office to avoid any delay in processing your request for financial aid. Contact our office if you have any questions regarding this form at 510.879.9200. Upload this completed form with any required documents or send to the Financial Aid Office by email to: finaid@samuelmerritt.edu.

A. Student Information:

Last Name	First Name	Middle Initial
Student ID#	Date of Birth	Email & Phone Number

B. Family Information:

In the table below, list the people in your parent's household and include:

- **You and your spouse (if applicable).**
- **Your children or your spouse's children** if they now live with you (or live apart due to a period of temporary absence such as college enrollment), you provide more than half of their support, and you will continue to provide more than half of their support through June 30, 2027.
- **Other people, if they now live with you**, you provide more than half of their support, and you will continue to provide more than half of their support through June 30, 2027.
- Include the name of the college for any household member who will be enrolled at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2026, and June 30, 2027.

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

If additional space is needed, provide a separate page with the student's name and ID number at the top.

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C. Student Income Information: DID YOU (THE STUDENT) FILE A 2024 TAX RETURN?

- ☐ If yes, complete Section 1 and SKIP Section 2
- ☐ If no, SKIP Section 1 and complete Section 2

SECTION 1: STUDENT TAX RETURN FILERS ONLY (This section is only for students and their spouses who filed a 2024 tax return.) Select only ONE of the following:

- ☐ I (and/or my spouse, if applicable) used the Direct Data Exchange on the 2026-27 FAFSA and successfully transferred my 2024 income data.
- ☐ I (and/or my spouse, if applicable) filed a US Tax Return and will submit a signed copy of the 2024 income tax return with applicable schedules or a 2024 Tax Return Transcript from the IRS (via www.irs.gov) to the Financial Aid Office at Samuel Merritt University.
- ☐ I (and/or my spouse, if applicable) filed a non-US (foreign) tax return and will submit a signed copy of the 2024 tax return that was filed with my relevant tax authority to the Financial Aid Office at Samuel Merritt University.

SECTION 2: STUDENT NON-TAX RETURN FILERS ONLY a. If you and/or your spouse **did not file** a 2024 Tax Return, check the box that applies below:

- ☐ I (the student) was not employed and earned no income from work in 2024.
- ☐ I (the student) was employed in 2024 but did not file and was not required to file a 2024 Tax Return.
- ☐ My spouse was not employed and earned no income from work in 2024.
- ☐ My spouse was employed in 2024 but did not file and was not required to file a 2024 Tax Return.

Do you have a US Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), or Employer Identification Number (EIN)?

Student: Yes _____ No _____

Spouse: Yes _____ No _____

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If you or your spouse earned income in 2024, list all sources and amounts of earnings, other income, and resources that supported you in 2024 in the table below. Be sure to submit all W-2 forms received to the Financial Aid Office at Samuel Merritt University.

Employer's Name / Source of Earned Income	Did you receive an IRS W-2 form?	Amount Earned (reported in Box 1 of Form W-2)?	Have Form W-2(s) been provided to Financial Aid Office?

If additional space is needed, provide a separate page with the student's name and ID number at the top.

D. Certification and Signatures:

Each person signing below certifies that all the information reported on this form is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date below. Warning: If you purposely give false or misleading information, you may be fined, sent to prison or both.

StudentDate

SpouseDate