



2026-2027 Independent Verification Worksheet

V5 Aggregate Verification Group (VI & V4)

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

- **Yourself 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.

Student

Date

Spouse

Date

E. VERIFICATION OF IDENTITY FOR VERIFICATION TRACKING GROUPS V4 AND V5

To complete V4 or V5 identity verification, a student must present an unexpired, valid, government-issued photo identification such as a U.S. passport, a driver's license, or other state-issued ID.

- ☐ The student appeared in-person and presented acceptable identification to an institutionally authorized individual.
- ☐ The student was unable to appear in-person and appeared on a video call with institutional personnel and presented the acceptable identification to an institutionally authorized individual.
- ☐ The student was unable to appear in-person and provided the institution with a copy of the acceptable identification presented to a notary and a signed notary statement.
- ☐ The student is a confined or incarcerated individual and was verified by an authorized official at the correctional facility where the individual is confined or incarcerated.

CERTIFICATION & SIGNATURE

Each person signing below certifies that all 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

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

State of _____

City/County of _____

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

personally appeared, _____, and proved to me
(Printed name of signer) because of satisfactory evidence of identification

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

WITNESS my hand and official seal _____
(Notary signature) (seal)

My commission expires on _____
(Date)

Certification Statement: By submitting this form, I certify that all the information above is complete and correct.

Student Signature: _____

Date: _____

FAO use only: I certify that the copy above is a true and accurate representation of the student's government issued identification:

Financial Aid Staff Signature: _____

Date: _____