2026-2027 Verification Worksheet
Independent Student – V1

Your 2026-2027 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. To verify that you provided correct information, the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

A. Independent Student's Information

Student's Last Name	Student's First Name	Student's M.I.	Student's ID Number

Student's Street Address (include apt. no.)	Student's Date of Birth

City	State	Zip Code	Student's Email Address

Student's Home Phone Number (include area code)	Student's Alternate or Cell Phone Number

B. Independent Student's Family Size

Family Size – Includes the following:

- The student
- The student's dependent children if all of the following are true:
  - They live with the student's parents (or live apart because of college enrollment),
  - They receive more than half of their support from the student; and
  - They will continue to receive more than half their support from the student during the award year.
- Other persons if the following are true:
  - They live with the student,
  - They receive more than half of their support from the student; and
  - They will continue to receive more than half their support from the student during the award year.

The provided criteria for "dependent children" or "other persons" mirror the requirement that family size align with those the student could claim as a dependent on a U.S. tax return if the student were to file a U.S. tax return at the time of completing the 2026-2027 FAFSA. As a result, the parent should not include any unborn children in the family size.

Full Name	Age	Relationship
		Self

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

C. Independent Student' Income Information to be Verified

1. Verification of 2024 Income Information for Student Tax Filers

Important Notice: The instructions below apply to the student and spouse (if the student is married). Notify the financial aid office if the student and spouse filed separate IRS income tax returns for 2024 or had a change in marital status after December 31, 2024.

Instructions: Complete this section if the student and spouse **filed or will file** a 2024 IRS income tax return(s). As part of federal student aid eligibility, students, and spouses (as appropriate), will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the student and spouse filed separate 2024 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2024 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS via the FA-DDX.

If 2024 income tax return information for the student (or spouse, if applicable) was not transferred via the FA-DDX and considered verified, the student should provide the institution with a **2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return and applicable schedules.**

A 2024 IRS Tax Return Transcript may be obtained through:

- Get Transcript by Mail – Go to 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, click "Get Your Tax Record." Click "Get Transcript online." Make sure to request the "Return Transcript" and ***NOT*** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay -as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- 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.

Important Note: If the student filed an Amended IRS Income Tax Return, was granted a Filing Extension by the IRS, were Victims of IRS Tax-Related Identity Theft or Filed a NON-IRS Income Tax Return please see Appendix A for information.

Student's Name: _____ **ID #:** _____

2. Verification of 2024 Income Information for Student Non-tax Filers

The instructions and certifications below apply to the student and spouse (if the student is married). Complete this section if the student and spouse will not file and **are not required** to file a 2024 income tax return with the IRS.

By completing this document, I certify that I have not filed and am not required to file a 2024 income tax return, and I have listed all income earned from work, other income, and resources for the 2024 tax year.

Also check any box that applies below:

☐ My spouse and/or I were not employed and had no income earned from work in 2024.

☐ My spouse and/or I were employed in 2024 and have listed below the names of all employers, the amount earned from each employer in 2024, and whether an IRS W-2 form or an equivalent document is provided.
[Provide copies of all 2024 IRS W-2 forms issued to you and your spouse. List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, provide a separate page with your name and ID number at the top.]

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2024
Suzy's Auto Body Shop (example)	*Yes*	*$4,500.00*
Total Amount of Income Earned from Work		$

☐ My spouse and/or I had other income and resources that supported us for the 2023 tax year. [List each source of income in the table below. If more space is needed, provide a separate page with your name and ID number at the top.]

Source of Income	Annual Amount Earned in 2024
(Example)Rental Property	*$4,500.00*
Total Amount of Income	*$*

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D. Certification and Signatures

IMPORTANT: To avoid a delay in processing, please review to make sure that every question has been answered and that you have provided all requested items. Additional information may be requested upon review of the initial documents submitted.

Each person signing below certifies that all of the verification documents submitted with this certification are complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

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

_____ _____

Print Student's Name | Student's ID Number

_____ _____

Student's Signature (required) | Date

_____ _____

Spouse's Signature (optional) | Date

Do not mail this worksheet to the U.S. Department of Education. Please complete and return all pages and supporting documents via our secure file link: https://securefile.wagner.edu/filedrop/FinancialAid/

DO NOT EMAIL THIS FORM UNLESS IT IS ENCRYPTED AND PASSWORD PROTECTED OR SUBMITTED THROUGH OUR SECURE LINK

APPENDIX A

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2024 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2024, must provide:

▪ A signed statement listing the sources of any 2024 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 2024;

▪ A copy of IRS Form W–2 for each source of employment income received or an equivalent document for tax year 2024; 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 2024.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2024 must provide a signed copy of the 2024 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

▪ Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return;

▪ A **2024 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 2024 IRS Form 1040 and the applicable schedules that were filed with the IRS.

APPENDIX A
Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

▪ A copy of the signed 2024 income tax return and applicable schedules the individual filed with the IRS, or an equivalent document provided by the IRS; **and**

▪ An IRS 4674C letter (a letter from the IRS acknowledging the identity theft) or a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft, and the IRS is aware of it.

Individuals Who Filed Non-IRS Income Tax Returns

▪ A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.