Lincoln University
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Office of Financial Aid
1570 Baltimore Pike
Lincoln University, PA 19352-0999
484-365-5300 phone
484-365-8198 fax
financialaid@lincoln.edu

2027-2028 DEPENDENT Verification Worksheet

Verification Group V5

Your Free Application for Federal Student Aid (FAFSA) was selected for review in a process called "Verification".

The following items are required prior to a financial aid award being finalized:

(1) This completed and signed Verification Worksheet.
(2) Your 2025 Federal Tax Return Transcript (if Federal Tax Information (FTI) was not utilized), or if applicable, the Statement of Non-Filing in Option 2. Any W-2 or 1099 statements from 2025.
(3) Your Contributor(s)' 2025 Federal Tax Return Transcript (if IRS Data Retrieval Tool was not utilized), or if applicable, the Statement of Non-Filing in Option 2. Any W-2 or 1099 statements from 2025.

If there are any differences between your FAFSA information and your financial documents, Lincoln University may need to make corrections to your record.

Section A: Student's Information

_____ _____
Last Name, First Name, M.I. Student ID Number

_____ _____
Street Address Date of Birth

_____ _____
City, State, Zip Code Phone Number

Section B: Dependent Student's Family Information

List below the people in your contributor(s)' household. Include:

- The student.
- The contributor (including a step-contributor)
- The contributors other children if the contributor will provide more than half of the children's support. Other people, if they now live with the contributor and the contributors, provide more than half of the other person's support, and will continue to provide more than half of that person's support through June 30, 2028.

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

Full Name	Age	Relationship
		Self

Note: We may request additional documentation if we have reason to believe the information is inaccurate.

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

Section C: Student Tax Filing Status for calendar year 2025:

Please complete Option 1 *or* Option 2.

Option 1: Student filed a 2025 IRS Tax Return: Please select an option below.

☐ Federal Tax Information (FTI) was used to file FAFSA *or*,

☐ 2025 IRS Tax Return Transcript is attached. To obtain an IRS Tax Return Transcript go to www.irs.gov and click "**Get Your Tax Record**".

☐ Check here if you had an IRA rollover into another IRA or qualified plan; include the amount reported in the space provided _____.

Option 2: Student was a Non-tax Filer for calendar year 2025:

I certify that I did not, and am not required to file a 2025 U.S. federal tax return. Please select an option below.

☐ Student was not employed and had no income earned from work in 2025.

☐ Student was employed in 2025 but did not file a federal tax return. Complete the table below to report on all employers and amount earned in 2025.

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

Employer's Name	**2025 Amount Earned**	**IRS W2 or an Equivalent Document Provided?**
	$	
	$	
	$	
Total Amount of Income Earned from Work		**$**

Provide a signed and dated statement certifying that the individual has not filed and is not required to file a 2025 income tax return, as well as the sources of 2025 income earned from work and the amount of income from each source.

☐ Check here if non-filing statement is signed and dated.

☐ Check here if non-filing statement will be provided later.

To request Federal tax information, go to www.irs.gov .

Section D: Contributor Tax Filing Status for calendar year 2025: Please complete Option 1 *or* Option 2.

Option 1: Contributor(s) filed a 2025 IRS Tax Return: Please select an option below.

☐ Federal Tax Information was used to file the FAFSA *or*,

☐ 2025 IRS Tax Return Transcript is attached. To obtain an IRS Tax Return Transcript go to www.irs.gov and click "**Get Your Tax Record**".

☐ Check here if you had an IRA rollover into another IRA or qualified plan; include the amount reported in the space provided _____.

Option 2: Contributor(s) was a Non-tax Filer for calendar year 2025:
I certify that I did not, and am not required to file a 2025 U.S. Federal Tax return. You are required to submit an official IRS Verification of Non-Filing Letter, go to www.irs.gov to request this document. Please select an option below.

☐ Contributors(s) were not employed, and did not earn income from work in 2025.

☐ Contributor(s) were employed in 2025 but did not file a federal tax return. Complete the table below to report all employers and amounts earned in 2025. You will need to provide copies of your IRS W-2 forms for 2025.

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

Employer's Name	**2025 Amount Earned**	**IRS W2 or an Equivalent Document Provided?**
	$	
	$	
	$	
Total Amount of Income Earned from Work		**$**

Provide a signed and dated statement certifying that the contributor(s) has not filed and is not required to file a 2025 income tax return, as well as the sources of 2025 income earned from work and the amount of income from each source (see above).

☐ Check here if non-filing statement is signed and dated.

☐ Check here if non-filing statement will be provided later.

To request Federal tax information, go to www.irs.gov .

Section E: **Identity/Statement of Educational Purpose**



The form must be completed and signed in the presence of either a Lincoln University Financial Aid Administrator or a Notary Public.

Do <u>not</u> complete this section in advance.

Identity/Statement of Educational Purpose (To be signed at the Institution)

Name of Student: _____ **Student ID#:** _____
Last Name **First Name** **M.I.**

The student must appear in person at Lincoln University to verify his or her identity by presenting an unexpired 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 by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID. In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

If Submitting in Person: Present this form with original valid government-issued photo ID **To be completed by The Lincoln University Financial Aid Administrator.**	
ID Type:	
ID Number:	**Exp. Date:**
FAA Name:	
FAA Title:	
FAA Signature:	**Date:**

Identity/Statement of Educational Purpose (To Be Signed in the Presence of a Notary)

If the student is unable to appear in person at Lincoln University to verify his or her identity, the student must provide to the institution:

(a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and

(b) The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

These forms will not be accepted if they are faxed or scanned to the Office of Financial Aid. We HAVE to be in receipt of all these original documents.

Statement of Educational Purpose

I certify that I, _____, am the individual signing this Statement of Educational
(Print Student's Name)
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 Lincoln University for 2027-2028.

_____ _____ _____
Student's Signature Date Student's ID Number

If Submitting by Mail:
Send this form with photocopy of valid government-issued photo ID
To be completed in the presence of a Notary Public.

State of:

City/County of:

Date:

Before me,
(print Notary's name):

Personally Appeared,
(printed name of signer):

Proved to me on the basis of satisfactory evidence of identification: _____
(type of unexpired government-issued photo ID provided)
To be the above –named person who signed the foregoing instrument.

Signed: _____ **My commission expires on: _____**
(Notary Signature)

Witness my hand and official seal

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

Section F: Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date. Typed computer signature(s) will not be accepted.

_____	_____
Print Student's Name	Student's ID Number
_____	_____
Student's Signature	Date
_____	_____
Contributor's Signature	Date

Please return this worksheet, along with the required documentation to:

Lincoln University
Office of Financial Aid
1570 Baltimore Pike Lincoln University, PA 19352

If you have any questions, please feel free to contact the Financial Aid Office at (484) 365-5300. Our office hours are 8:30 a.m. to 5:00 p.m., Monday through Friday.