



2023-2024 INDEPENDENT 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 2021 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 2021.
- 3) Your Spouses' 2021 Federal Tax Return Transcript (if IRS Data Retrieval Tool was not utilized), or if applicable, the Statement of Non-Filing in Option 2.
- 4) Any W-2 or 1099 statements from 2021.

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: Independent Student's Family Information

List below the people in the student's household. Include:

- The student.
- The student's spouse, if the student is married.
- The student's or spouse's children if the student or spouse will provide more than half of the children's support. Other people if they now live with the student and the student or spouse provides 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, 2024.
- Indicate who in your household is or will be attending an institution of higher education at least half-time from July 1, 2023 to June 30, 2024.

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	Name the College the Household Members are Currently Attending	Did/Will this person file a 2021 Federal Tax Return?
		Self	Lincoln University	Yes ____ No ____
				Yes ____ No ____
				Yes ____ No ____
				Yes ____ No ____
				Yes ____ No ____
				Yes ____ No ____
				Yes ____ No ____
				Yes ____ No ____

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

Section C: Student and Spouse (if married) Tax Filing Status for calendar year 2021:

Please complete [Option 1](#) or [Option 2](#).

Option 1: Student and spouse (if married) filed a 2021 IRS Tax Return: Please select an option below.

☐ IRS Data Retrieval Tool was used to file FAFSA or,

☐ 2021 IRS Tax Return Transcript is attached. To obtain an IRS Tax Return Transcript go to www.irs.gov and click “**Get Your Tax Return.**”

Option 2: Student and Spouse (if married) was a Non-tax Filer for calendar year 2021:

I certify that I did not, and am not required to file a 2021 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.

☐ Was not employed and had no income earned from work in 2021.

☐ Was employed in 2021, but did not file a federal tax return. Complete the table below to report all employers and amount earned in 2021. You may be required to provide copies of your IRS W-2 forms for 2021.

Employer's Name	2021 Amount Earned

Section D: 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 not 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 2023-2024.

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: _____ (Notary Signature)	My commission expires on: _____
Witness my hand and official seal	

Section E: Certification and Signatures

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

Each person signing this worksheet certifies that all of the information reported is complete and correct.

Print Student's Name: _____ Student's ID Number _____

Student's Signature: _____ Date: _____

Spouse'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 (800)-561-2606. Our office hours are 8:30 a.m. to 4:00 p.m., Monday through Friday.