



2023-2024 Verification Worksheet

Your 2023-2024 FAFSA was selected for review in a process called **Verification**. Before awarding federal aid, we must ask you to confirm the information reported on your FAFSA. To verify that you provided correct information, you and at least one parent (if you are a dependent student) must complete this worksheet, attach any required documents, and submit all paperwork to Student Financial Services via email at financialservices@montreat.edu or fax at 828-412-0257. Do not leave any section blank or unsigned as this will cause your paperwork to be marked as incomplete and will result in our inability to disburse your federal aid. **We cannot accept pictures of documents; all paperwork should be submitted in .pdf format.** Please note that any adjustments made to your FAFSA as a result of Verification could affect the amount of financial aid you are eligible to receive which could alter your balance due.

IMPORTANT – This form will be considered invalid if:

- It is not signed by both the student and parent
- All household members, including yourself, are not listed
- 1040 forms are not manually signed by the taxpayer unless the form is prepared by a firm with an EIN number included

Student Information:

Last Name	First Name	Student Identification Number
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Household Information:

List below all of the people who will be living in your household from July 1, 2023 to June 30, 2024. Students are considered dependent unless they are over the age of 24, married, have dependents, are an orphan/ward of the court are legally emancipated, or are a veteran/active duty member of the armed forces.

Dependent Students

Include, if applicable

- Yourself
- Your parents (including stepparents)
- Your siblings and any other dependents or household members who will receive more than half of their support from the parents.

Independent Students

Include, if applicable

- Yourself
- Your spouse
- Your children
- Any other dependents or household members who will receive more than half of their support from you or your spouse.

Full Name	Age	Relationship to Student	Will be enrolled at least half-time?	Name of College or University
		<i>Self</i>	<i>Yes</i>	<i>Montreat College</i>

Of those listed above, write in the name of the college or university for any family member who will be enrolled at least half-time in a degree or certificate program between July 1, 2023 and June 30, 2024.

Student and Parent Income Information

Important Note: If the student or parent filed an amended 2021 IRS tax return, *the student or parent must contact Student Financial Services at financialservices@montreat.edu before completing this section.*

1. STUDENT TAX RETURN FILERS

Check the box that applies:

- The student has used the **IRS Data Retrieval Tool** to transfer their 2021 IRS income information into their FAFSA. *Contact Student Financial Services for instructions to learn how to use this tool.*
- The student is unable or chooses not to use the IRS Data Retrieval Tool and has attached a **2021 IRS Tax Return Transcript or manually signed copy of their 2021 1040 Form**. *Contact Student Financial Services to learn how to obtain an IRS tax return transcript.*

2. PARENT TAX RETURN FILERS

Check the box that applies:

- The parent has used the **IRS Data Retrieval Tool** to transfer their 2021 IRS income information into the student's FAFSA. *Contact Student Financial Services for instructions on how to use this tool.*
- The parent is unable or chooses not to use the IRS Data Retrieval Tool and has attached a **2021 IRS Tax Return Transcript or manually signed copy of their 2021 1040 Form**. *Contact Student Financial Services to learn how to obtain an IRS tax return transcript.*

3. TAX RETURN NONFILERS

Check the box that applies:

- The **student** was not employed and had no income earned from work in 2021.
- The **parent** was not employed and had no income earned from work in 2021*
- The student/parent was employed in 2021 but will not file and is not required to file** an income tax return with the IRS. List below the names of all employers and the amount earned from each employer. **Please attach copies of all 2021 IRS W-2 forms** issued to the student/parent by all employers, if applicable.

Employer's Name	2021 Amount Earned

* If the single parent of a dependent student reports no taxes filed or income earned in 2021, that parent is expected to provide a separate written explanation indicating how they support themselves and their dependents (e.g., spousal or familial support, government assistance, etc.).

**Parents who were employed but were not required to file an income tax return with the IRS must provide documentation dated on or after October 1, 2022 indicating a 2021 IRS income tax return was not filed with the IRS, or a signed statement certifying that the individual(s) attempted to obtain confirmation of non-filing from the IRS and were unable to obtain the required documentation.

Identification

You must complete 1 of the following:

1. **Mail** this signed form (original copies only) along with a copy of a valid, non-expired government-issued photo identification* to:
 - Montreat College
 - Office of Student Financial Services
 - P.O. Box 1267
 - Montreat, NC 28757.

2. **Scan** this signed form along with a copy of a valid, non-expired government-issued photo identification* to financialservices@montreat.edu.

**Valid government-issued photo identification includes, but is not limited to, a driver's license, military identification, or passport.*

Statement of Educational Purpose

I certify that I, _____, (**print student's name**) am the individual signing this Statement of Education Purpose and that the federal student financial assistance I may receive will only be used for educational purposes to pay for the cost of attending Montreat College for the 2023-2024 award year.

Certifications and Signatures:

*Each person signing below certifies that all the information reported above is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date. **Digital or typed signatures will not be accepted; please sign manually in black ink.***

Student Signature _____ **Date** _____

Parent Signature (of dependent student) _____ **Date** _____