

2024-2025 INDEPENDENT VERIFICATION WORKSHEET

Southern Wesleyan University
PO Box 1020
Central, SC 29630
864-644-5500

Student's Last Name, First Name, M.I.

SWU ID # **OR** Last 4 digits Social Security Number

E-mail Address

Phone Number

WHY MUST I COMPLETE THIS WORKSHEET?

Your 2023-2024 financial aid application has been selected for a review process called "verification." Federal law requires the applicant and his/her family to participate in the verification process, which is used to ensure the accuracy of the information reported on the student's Free Application for Federal Student Aid (FAFSA). When all information is received, it will be reviewed for accuracy, and conflicting or inconsistent information will be corrected.

SECTION 1- Household Information

Please list below the people you (and your spouse) will support *between July 1, 2024 and June 30, 2025.*

- Include yourself, your spouse, and dependent children (including step-children; **DO NOT** include foster children).
- Include other people **ONLY** if they live with you and receive **MORE THAN** half their support from you now **AND** will continue to receive this support **THROUGH JUNE 30, 2025**.
- Include the college/university attended by household members who will be pursuing a degree at least halftime (usually 6 hours/semester) in 2023-2024.

Full Name of Family Member IN Your Household (INCLUDING spouse/children)	Relationship to Student	Age	Name of College/University in 2024-2025
1. You, the student	Self		Southern Wesleyan University
2.			
3.			
4.			
5.			
6.			
7.			
8.			

SECTION 2—Tax Income Information

1. DID YOU (THE STUDENT) HAVE ANY INCOME IN **2022**? YES OR NO (CIRCLE ONE)

CHECK ONE BOX ONLY:

- ☐ CHECK HERE IF YOU FILED A **2022** FEDERAL TAX RETURN.
- ☐ CHECK HERE IF YOU WILL FILE A **2022** FEDERAL TAX RETURN.
- ☐ CHECK HERE IF YOU WILL NOT FILE AND ARE NOT REQUIRED TO FILE A FEDERAL TAX RETURN.

\$_____ IF YOU **DID NOT** FILE A TAX RETURN BUT HAD EARNINGS FROM WORK, LIST THE AMOUNT YOU EARNED. ENTER A ZERO IF NO EARNINGS. PROVIDE ALL W-2s, MISC-1099s, AND/OR SSA-1099 FORMS TO DOCUMENT YOUR EARNINGS IF YOU DID NOT FILE A RETURN.

2. DID YOUR SPOUSE HAVE ANY INCOME IN **2022**? YES OR NO (CIRCLE ONE)

CHECK ONE BOX ONLY:

- ☐ CHECK HERE IF YOUR SPOUSE FILED A **2022** FEDERAL TAX RETURN.
- ☐ CHECK HERE IF YOUR SPOUSE WILL FILE A **2022** FEDERAL TAX RETURN.
- ☐ CHECK HERE IF YOUR SPOUSE WILL NOT FILE AND IS NOT REQUIRED TO FILE A FEDERAL TAX RETURN.

\$_____ IF YOUR SPOUSE **DID NOT** FILE A TAX RETURN BUT HAD EARNINGS FROM WORK, LIST THE AMOUNT YOUR SPOUSE EARNED. ENTER A ZERO IF NO EARNINGS. PROVIDE ALL W-2s, MISC-1099s, AND/OR SSA-1099 FORMS TO DOCUMENT YOUR EARNINGS IF YOU DID NOT FILE A RETURN.

***** SEE LAST PAGE FOR INSTRUCTIONS ON OBTAINING A TAX TRANSCRIPT OR USING THE IRS DRT FEATURE ON THE FAFSA.**

SECTION 3—Student & Spouse Certification

I (WE) CERTIFY ALL INFORMATION ON THIS FORM IS COMPLETE AND CORRECT.

Student Signature (REQUIRED) _____ Date _____

Spouse Signature (OPTIONAL) _____ Date _____

 Please review the information you have provided for accuracy. This could save valuable time.

DID YOU REMEMBER TO...

- ☐ **Proof read this entire worksheet for accuracy. If pertinent information is left blank, this form will be returned and may affect your student financial aid eligibility.**
- ☐ **Request a tax return transcript or use the IRS Data Retrieval Tool (DRT) on the FAFSA. Obtain tax return transcripts one of three ways:**
 - Sign-in to your FAFSA at www.fafsa.ed.gov and use the IRS data retrieval tool on the financial section. If eligible, it will transfer your information from the IRS database directly to your FAFSA. **You are NOT eligible to use the DRT if you or your spouse filed any of the following:**
 - **As Married Filing Separately**
 - **As Head of Household while married**
 - **A Puerto Rican or foreign tax return.**

If you have questions about how to use the IRS data retrieval tool, you can access an instructional video from SWU's website at <http://www.swu.edu/campus/financial-aid/fafsa>. If you successfully use the IRS retrieval tool, we will not need a tax transcript from you. In essence, the IRS data retrieval tool will alleviate the need for a tax transcript.
- Go to <http://www.irs.gov>, click on the "Get My Tax Record" link and then click the "Get Transcript Online." Follow the prompts to register/sign-in and to request a transcript. Be sure to request the "**IRS Tax Return Transcript.**" **DO NOT REQUEST THE "IRS Tax Account Transcript."** The copy can be sent to our office via encrypted email, faxed or mailed to our office.
- Call the IRS at 1-800-908-9946 to request a tax transcript.
- Visit your local tax office. Find your local tax office here – <https://apps.irs.gov/app/officeLocator/index.jsp>.

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

On-Campus Student Counselor:

SUSIE SIMMONS

ssimmons@swu.edu

Phone (Local): (864) 644-5517

Phone (Toll-free): (800) 282-8798 ext. 5517

Online Student Counselor:

CAMI MILLER

cmiller@swu.edu

Phone (Local): (864) 644-5519

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