



FINANCIAL AID OFFICE
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2023-2024 Verification Worksheet Independent V5

Please read the entire form, complete ALL sections, attach the requested documentation, sign the form, and return to the Financial Aid Office. By law, Luna Community College has the right to request this information before awarding financial aid. *Incomplete worksheets and documentation will cause delays in processing your financial aid. No determination of aid eligibility can be made until all documents are received and reviewed.* **Warning: If you purposely give false or misleading information on this form, you may be fined, be sentenced to jail, or both.**

A. Student's Information

Print Student's Name

LCC ID #

Student's LCC Email Address

Student's Phone Number (Include area code)

B. Family Information

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

- The student.
- The student's spouse (if married).
- The student's or spouse's children if the student or spouse will provide more than half of the children's support from July 1, 2023, through June 30, 2024, even if a child does not live with the student.
- 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.

Number in College: Include in the space below information about any household member who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2022, and June 30, 2023, and include the name of the college.

Full Name	Age	Relationship	College or University	Will be Enrolled at Least Half Time (yes or no)
		Self	<i>Luna Community College</i>	

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

C. STUDENT and/or SPOUSE- 2021 IRS Income Tax Return Information**Check the box that applies:**

The STUDENT and/or SPOUSE has **filed or will file** a 2020 IRS Income Tax Return. **GO TO SECTION D.**

The STUDENT and/or SPOUSE **will not and is not required** to file a 2020 IRS Income Tax Return. **GO TO SECTION E.**

D. Verification of 2021 IRS Income Tax Information- STUDENT and/or SPOUSE (Tax Filers ONLY)

TAX RETURN FILERS- Complete this section if the **STUDENT and/or SPOUSE** **filed or will file** a 2021 IRS income tax return(s). The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of the FAFSA online application. **Contact the financial aid office if the student and spouse filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021.**

Check the box that applies:

The STUDENT and/or SPOUSE **has used or will use** the IRS DRT feature while completing the *FAFSA on the Web* to transfer 2021 IRS income tax return information.

The STUDENT and/or SPOUSE **was unable or chooses not to** use the IRS DRT feature while completing the FAFSA on the Web, and instead *will provide LCC a 2021 IRS Tax Return Transcript.*

To obtain a 2021 IRS Tax Return Transcript:

- **Online Request-** Go to www.irs.gov, click on the "Get Your Tax Record". Click "Get Transcript Online" or "Get Transcript by Mail". Make sure to request the "IRS Tax Return Transcript". An "IRS Tax Account Transcript" will NOT be accepted.
- **Automated Telephone Request-** 1-800-908-9946
- **Paper Request** - IRS Form 4506-T must be completed and submitted to the IRS

E. Verification of Nontax Filer- STUDENT and SPOUSE

NONTAX FILER - Complete this section if the STUDENT **will not file and is not required** to file a 2021 tax return with the IRS. All non-tax filers **MUST** submit a "*Verification of Nonfiling*" from the IRS to the Financial Aid Office.

Check the box that applies:

The STUDENT and/or SPOUSE **were not employed** and had no income earned from work in 2021. **The STUDENT and/or SPOUSE will submit a "Verification of Nonfiling" from the IRS. (IRS 4506-T must be completed and submitted to the IRS)**

The STUDENT and/or SPOUSE **was employed** in 2020 and has listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form was provided or not. List every employer even if the employer did not issue an IRS W-2 form.

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2021
<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

Student Name: _____

LCC ID #: _____

F. Identity and statement of Educational Purpose

Check the box that applies:

I will appear in person at Luna Community College to verify my 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. **(Complete Section 1).**

I am unable to appear in person at Luna Community College to verify my identity. **(Complete Section 2)**

1. The student must sign, in the presence of the institutional official, the following:

Statement of Educational Purpose
(To be signed at Luna Community College)

I certify that I _____ am the individual signing this *Statement of Educational Purpose*
(Print Student's Name)

and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Luna Community College for 2023-2024.

(Student's Signature)

(Date)

(LCC ID Number)

Financial Aid Office Use:
Initial: _____
Date: _____
ID used: _____

2. **If unable to appear in person at Luna Community College to verify his/her identity, the student must provide:**

(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.

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

I certify that I _____ am the individual signing this *Statement of Educational Purpose*
(Print Student's Name)

and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Luna Community College for 20223-2024.

(Student's Signature)

(Date)

Student Name: _____

LCC ID #: _____

Notary's Certificate of Acknowledgement

State of _____ City/County of _____

On _____, before me, _____, personally appeared,
(Date) (Notary's name)

_____, and provided to me on basis of satisfactory
(Printed name of signer)

evidence of identification _____ to be the above-named person
(Type of unexpired government-issued photo ID provided)

who signed the foregoing instrument.

WITNESS my hand and official seal

(seal)

(Notary signature)

My commission expires on _____
(Date)

G. Certifications and Signatures

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

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

Print Student's Name

LCC ID #

Student's Signature Required

Date

Spouse's Signature (Optional)

Date