

**2019-2020 Aggregate Verification Worksheet  
Independent Student**

Your 2019-2020 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law states that during the verification process, we may ask you to confirm the information that you reported on your FAFSA. We will compare your FAFSA data to the information provided on this worksheet and to any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this institutional verification document, attach any required documents, and submit the form and other required documents to the GSEP Financial Aid Office. We may ask for additional information. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

**A. INDEPENDENT STUDENT'S INFORMATION**

Student's Full Name: \_\_\_\_\_ Campus Wide ID (CWID)#: \_\_\_\_\_

Student's Date of Birth: \_\_\_\_\_ Home or Cell phone number: \_\_\_\_\_

Email Address: \_\_\_\_\_

**B. INDEPENDENT STUDENT'S FAMILY INFORMATION**

**Number of Household Members:** 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 from July 1, 2019, through June 30, 2020, 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, 2020.

**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, 2019, and June 30, 2020, and include the name of the college.

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

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		<i>Self</i>	<i>Pepperdine University</i>  <i>CWID #:</i> _____	

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

### C. Independent STUDENT'S Tax Forms and Income Information

#### 1. STUDENTS (and spouse) FILING A 2017 TAX RETURN

Complete this section if the student and spouse filed or will file a 2017 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 FAFSA on the Web at [FAFSA.gov](http://FAFSA.gov). In most cases, no further documentation is needed to verify 2017 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Notify the financial aid office if the student had a change in marital status after December 31, 2017.

- ☐ I have used or will use the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2017 IRS tax return information into the student's FAFSA.
- ☐ I filed a 2017 federal tax return, but I am unable or choose not to use the IRS DRT in FAFSA on the Web, and instead will provide the school with a 2017 IRS Tax Return Transcript(s). *Please see instructions on page 5.*
- ☐ My spouse and I filed separate 2017 IRS income tax returns. We will provide the school with each of our 2017 IRS Tax Return Transcripts. *Please see instructions on page 5.*
- ☐ I filed a joint tax return for 2017, but I am now separated, divorced, or widowed. Please submit each of your W-2 forms and a 2017 tax return transcript. *Please see instructions on page 5.*

#### 2. STUDENTS FILING A 2017 TAX RETURN WITH UNUSUAL CIRCUMSTANCES

- ☐ Individuals granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2017. *Please contact the GSEP Financial Aid Office.*
- ☐ Individuals who filed an amended IRS income tax return for tax year 2017. *Please contact the GSEP Financial Aid Office.*
- ☐ Individuals who were victims of IRS tax-related identity theft. *Please contact the GSEP Financial Aid Office.*
- ☐ Individuals who filed non-IRS income tax returns. *Please see instructions on page 5.*

### 3. STUDENTS NOT FILING A TAX RETURN

Complete this section if the student and spouse will not file and are not required to file a 2017 income tax return with the IRS. In addition: You must provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2018 that indicates a 2017 IRS income tax return was not filed with the IRS or other relevant tax authority. Please see instructions on page. For more information regarding filing requirements for most taxpayers, please refer to the 2017 IRS Publication 501: <https://www.irs.gov/pub/irs-prior/p501--2017.pdf>

- ☐ The student and/or spouse were not employed and had no income earned from work in 2017.
- ☐ The student and/or spouse were employed in 2017 and have listed below the names of all employers, the amount earned from each employer in 2017, and whether an IRS W-2 form is provided. Provide copies of all 2017 IRS W-2 forms issued to the student and/or spouse by their employers. List every employer even if they did not issue an IRS W-2 form.

*If more space is needed, provide a separate page with the student's name and ID number at the top.*

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2017

### D. CERTIFICATION AND SIGNATURE (Electronic signatures will not be accepted)

*I certify that all information reported on this form and on any attachments are complete and correct. I give permission to the Financial Aid Office to make corrections/adjustments to data on my FAFSA based on forms and/or documents submitted.*

\_\_\_\_\_  
Student's Name

\_\_\_\_\_  
CWID Number

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

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

FOR OFFICE USE ONLY

F. A. Administrator Signature: \_\_\_\_\_ Date Original Document Received: \_\_\_\_\_

Comments:

## **INSTRUCTIONS ON REQUESTING 2017 TAX RETURN TRANSCRIPTS OR PROOF OF NON-FILING**

As a reminder, the best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](https://fafsa.gov). In most cases, no further documentation is needed to verify 2017 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer. Otherwise, a 2017 IRS Tax Return Transcript or proof of non-filing may be obtained through:

- Get Transcript ONLINE - Go to [www.irs.gov](https://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Get Transcript by Mail - Go to [www.irs.gov](https://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Automated Telephone Request – 1-800-908-9946. The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Paper Request Form – Use the links to download IRS Form [4506T-EZ](#) or [IRS Form 4506-T](#). The transcript is generally received within 10 business days from the IRS's receipt of the online request.

### **INDIVIDUALS WHO FILED NON-IRS INCOME TAX RETURNS**

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.