

# PEPPERDINE UNIVERSITY

Graduate School of Education and Psychology

## 2013-2014 Aggregate Verification Worksheet Independent Student

Your 2013–2014 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with 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 us. 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

_____ Last Name	_____ First Name	_____ M.I.	_____ Campus-Wide ID Number (CWID)
_____ Street Address (include apt. no.)			_____ Date of Birth
_____ City	_____ State	_____ Zip Code	_____ Email Address
_____ Home Phone Number (include area code)			_____ Alternate or Cell Phone Number

### B. Independent Student's Family Information

Below, list the people in your household. Include:

- Yourself
- Your spouse, if you are married.
- Your children, and/or your spouse's children if you will provide more than half of their support from July 1, 2013, through June 30, 2014, even if the children do not live with you.
- Other people if they now live with you and you and/or your spouse provide more than half of their support and will continue to provide more than half of their support through June 30, 2014.

For any household member who 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, 2013, and June 30, 2014, include the name of the college. *If more space is needed, provide a separate page with your name and CWID number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		<i>Self</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.*

Student's Name: \_\_\_\_\_ CWID: \_\_\_\_\_

**C. Independent Student's 2012 Income Information**

**TAX RETURN FILERS - Important Note:** The instructions below apply to you, the student, and your spouse, if married. Notify the financial aid office if you or your spouse filed separate IRS income tax returns for 2012 or had a change in marital status after the end of the 2012 tax year on December 31, 2012.

**Instructions:** Complete this section if you, the student filed or will file a 2012 IRS income tax return. *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.* In most cases, no further documentation is needed to verify 2012 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

**Check the box that applies:**

- I, the student, have used the IRS DRT in *FAFSA on the Web* to transfer my 2012 IRS income tax return information into my FAFSA.
- I, the student, have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer my 2012 IRS income tax return information into my FAFSA once the 2012 IRS income tax return has been filed.
- I, the student, am unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2012 IRS Tax Return Transcript(s)**. (signature not required)

To obtain a **2012 IRS Tax Return Transcript**, go to [www.irs.gov](http://www.irs.gov) and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure to request the "IRS Tax Return Transcript" and **not** the "IRS Tax Account Transcript." Use the Social Security Number and date of birth of the first person listed on the 2012 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2012 IRS income tax return). In most cases, for electronic filers, a 2012 IRS Tax Return Transcript may be requested from the IRS within 2–3 weeks after the 2012 IRS income tax return has been accepted by the IRS. Generally, for filers of 2012 paper IRS income tax returns, the 2012 IRS Tax Return Transcript may be requested within 8–11 weeks after the 2012 paper IRS income tax return has been received by the IRS.

If the student and spouse filed separate 2012 IRS income tax returns, **2012 IRS Tax Return Transcripts** must be provided for both.

- \_\_\_\_ Check here if a **2012 IRS Tax Return Transcript(s)** is provided.
- \_\_\_\_ Check here if a **2012 IRS Tax Return Transcript(s)** will be provided later.

**NON-TAX RETURN FILERS - Important Note:** The instructions below apply to you, the student, and your spouse, if married.

**Instructions:** Complete this section if you and your spouse, if married, will not file and are not required to file a 2012 income tax return with the IRS.

**Check the box that applies:**

- I, the student (and, if married, my spouse) was not employed and had no income earned from work in 2012.
- I, the student (and/or my spouse if married) was employed in 2012 and have listed below the names of all employers, the amount earned from each employer in 2012, and whether an IRS W-2 form is provided. (Provide copies of all 2012 IRS W-2 forms issued to you and your spouse by your employers). List every employer even if the employer did not issue an IRS W-2 form. *If more space is needed, attach a separate page that includes your name and CWID number at the top.*

Employer's Name	2012 Amount Earned	IRS W-2 Provided?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000</i>	<i>Yes</i>

Student's Name: \_\_\_\_\_ CWID: \_\_\_\_\_

**D. Independent Student's Other Information**

1. Complete this section if someone in your household (listed in Section B) received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as the Food Stamp Program) sometime during 2011 or 2012. SNAP may be known by another name in some states. For assistance in determining the name used in a state, please call 1-800-4FED-AID (1-800-433-3243).

One of the persons listed in Section B of this worksheet received SNAP benefits in 2011 or 2012. If asked by my school, I will provide documentation of the receipt of SNAP benefits during 2011 and/or 2012.

2. Complete this section if you or your spouse, if married, paid child support in 2012.

Either I, or if married my spouse who is listed in Section B of this worksheet, paid child support in 2012. I have indicated below the name of the person who paid the child support, the name of the person to whom the child support was paid, the name of the child for whom child support was paid, and the total annual amount of child support that was paid in 2012 for each child. If asked by my school, I will provide documentation of the payment of child support. *If you need more space, attach a separate page that includes your name and CWID number at the top.*

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Amount of Child Support Paid in 2012

Note: If we have reason to believe that the information regarding child support paid is not accurate, we may require additional documentation, such as:

- A copy of the separation agreement or divorce decree that shows the amount of child support to be provided;
- A statement from the individual receiving the child support certifying the amount of child support received; or
- Copies of the child support payment checks or money order receipts.

**E. Identity and Statement of Educational Purpose**

In order to complete the Verification process, you will need to appear in person at Pepperdine University's Graduate School of Education and Psychology at the **West LA campus**. To verify your identity, you will need to present a valid government-issued photo ID (such as a driver's license, passport, etc.) and this verification worksheet to an institutionally authorized financial aid administrator. Pepperdine University will maintain a copy of your photo ID that is annotated with the date it was received and the name of the financial aid administrator at the University authorized to collect your ID.

You will need to sign the below Statement of Educational Purpose in the presence of a financial aid administrator. *If you are unable to appear in person to verify your identity, you must provide a copy of your valid government-issued photo ID that is acknowledged in the notary statement on the following page as well as the original notarized Statement of Educational Purpose.*

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this Statement of Educational Purpose and that the  
(Print Student's Name)

federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending

\_\_\_\_\_ for 2013-2014.  
(Name of Postsecondary Educational Institution)

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student CWID #)

Student's Name: \_\_\_\_\_ CWID: \_\_\_\_\_

**Notary's Certificate of Acknowledgement**

State of \_\_\_\_\_

City/County of \_\_\_\_\_

On \_\_\_\_\_, before me, \_\_\_\_\_,  
(Date) (Notary's name)

personally appeared, \_\_\_\_\_, and proved to me  
(Printed name of signer)

on basis of satisfactory evidence of identification \_\_\_\_\_  
(Type of government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

**WITNESS my hand and official seal**  
(seal) \_\_\_\_\_  
(Notary signature)

My commission expires on \_\_\_\_\_  
(Date)

**F. Certification and Signature**

*I certify that all information reported on this form and on any attachments is complete and correct. If requested, I agree to provide documentation to support the information I have provided on this form.*

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

\_\_\_\_\_  
Student's Signature (Required)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature (Optional)

\_\_\_\_\_  
Date

***Please mail, fax, or scan and email all required documentation to the GSEP Financial Aid Office:***

6100 Center Drive, 5<sup>th</sup> Floor  
Los Angeles, CA 90045  
Phone: 310-568-5775  
Fax: 310-568-2399  
Email: GSEPFaid@pepperdine.edu

*You should make a copy of this worksheet for your records.*