

2026–2027 Verification Worksheet

V1 Independent Student

Your 2026–2027 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.

Student's Information

Student's Last Name First Name M.I.

Student's ID Number (if known)

Student's Street Address (include apt. no.)

Student's Date of Birth

City, State Zip Code

Student's Email Address

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Student's Home Phone Number (include area code)

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Student's Alternate or Cell Phone Number

Family Size

Family Size includes the following:

- The student.
- The student's spouse, if the student is married.
- The student's or spouse's dependent children if they live with the student (or live apart because of college enrollment) and the student or spouse provides more than half of their support and will continue to provide more than half of that person's support through June 30, 2027.
- 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, 2027.

Full Name	Age	Relationship to Student
		<i>Self</i>

Verification of 2024 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2024 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2024, must provide:

- A signed statement listing the sources of any 2024 income and the amount of income from each source;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2024;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2024; and
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2024.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2024 must provide a signed copy of the 2024 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
- A **2024 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2024 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS or, if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2024 income tax return and applicable schedules the individual filed with the IRS; **and**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

Individuals Who Filed Non-IRS Income Tax Returns

A tax filer who filed an income tax return with a tax authority other than the IRS 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.

Verification of 2024 Income Information for Student Tax Filers

*If the student and spouse (if applicable) did not and is not required to file a 2024 tax return, **this page does not apply.***

Important Note: The instructions below apply to the student and spouse if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2024 or had a change in marital status after December 31, 2024.

If the student and spouse filed separate 2023 IRS income tax returns, the IRS DRT cannot be used and the **2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return(s) and applicable schedules** must be provided for each.

Instructions: Complete this section if the student and spouse filed or will file a 2024 IRS income tax return(s). As part of federal student aid eligibility, students and spouses will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the student and spouse filed separate 2024 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2024 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

If 2024 income tax return information for the student (or spouse, if applicable) was not available or could not be used, the student should provide the institution with a 2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return and applicable schedules.

Check the box(es) that applies:

- ☐ The student's 2024 income tax return information was available and could be used on the FAFSA.
- ☐ The student's 2024 income tax return information was not available or could not be used on the FAFSA.
 _____ Check here if a signed copy of the 2024 income tax return and applicable schedules **is provided with this worksheet.**
 _____ Check here if a 2024 IRS Tax Return Transcript **is provided with this worksheet.**
- ☐ The spouse's 2024 income tax return information was available and could be used on the FAFSA.
- ☐ The spouse's 2024 income tax return information was not available or could not be used on the FAFSA.
 _____ Check here if a signed copy of the 2024 income tax return and applicable schedules **is provided with this worksheet.**
 _____ Check here if a 2024 IRS Tax Return Transcript **is provided with this worksheet.**

A **2024 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by Mail – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript Online – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "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.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – 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 paper request form.

Verification of 2024 Income Information for Student Non-tax Filers

If the student (and spouse, if applicable) filed a 2024 tax return, **this page does not apply.**

The instructions and certifications below apply to the student and spouse if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2024 income tax return with the IRS.

Check the box that applies:

- ☐ The student and spouse were not employed and had no income earned from work in 2024.
- ☐ The student and/or spouse were employed in 2024 and have listed below the names of all employers, the amount earned from each employer in 2024, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2023 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer 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 2024
<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

Independent students who are Nontax Filers must provide a signed and dated statement certifying that the individual has not filed and is not required to file a 2024 income tax return, as well as the sources of 2024 income earned from work and the amount of income from each source. An example is provided below.

I, _____, certify that I did not file and was not required to file a 2024 income tax return. All sources of my 2024 income are included above.

Signature

Date

Spouse Statement, if applicable

I, _____ (student's spouse), certify that I did not file and was not required to file a 2024 income tax return. All sources of my 2024 income are included above.

Signature

Date

**Certification and Signature
(Independent Student)**

Certification and Signature

Each person signing below certifies that all 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

Student's ID Number

Student's Signature (Required)

Date

Spouse's Signature (Optional)

Date

Return this completed worksheet and all related/requested documentation to:

Lees-McRae College
Office of Financial Aid
PO Box 128
Banner Elk, NC 28604