

V5: Independent Verification Worksheet 2025-2026

SECTION 2: VERIFICATION OF 2023 INCOME INFORMATION FOR STUDENT TAX FILERS

Instructions: Complete this section if the student and spouse (if married) **filed or will file** a 2023 IRS income tax return(s). Check all that apply:

- ☐ **I/We consented to transfer the 2023 IRS income tax information and it was successfully transferred into the FAFSA.**
 - In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.
- ☐ **I/We consented to transfer the 2023 IRS income tax information and it was not transferred into the FAFSA.**
 - If the 2023 income tax return information for student and spouse (if applicable) was not available or could not be used, provide the MBU Financial Aid Office with a 2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules. If the student and spouse (if applicable) filed "married filing separately", **both** the student and spouse's tax return transcripts for 2023 will need to be sent to us.
A 2023 IRS Tax Return Transcript may be obtained through:
 - **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.
 - **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.
 - **Automated Telephone Request**
 - Call 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.
- ☐ **I/We filed an amended IRS Income Tax Return for 2023.**
 - Provide a signed copy of the 2023 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 return;
 - A 2023 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 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS.

SECTION 3: VERIFICATION OF 2023 INCOME FOR NON-TAX FILERS

Instructions: Complete this section **ONLY** if the student and/or spouse will not, **and were not required to**, file a 2023 income tax return with the IRS. Follow each of the steps below.

Step 1: Student Non-Tax Filer - check the appropriate box below:

- ☐ Student was not employed and had no income earned from work in 2023.
- ☐ Student was employed in 2023 and have listed below the names of all employers, the amount earned from each employer in 2023, and whether an IRS W-2 form or an equivalent document is provided. List every employer even if the employer did not issue an IRS W-2 form. If additional space is needed, provide a separate page which includes the student's name and MBU ID.

Employer's Name	IRS W-2 or Equivalent Document Provided by Employer?	Annual Amount Earned in 2023
		\$
		\$
		\$
		\$
Total amount of income earned from work		\$

Step 2: Spouse Non-Tax Filer. Check the appropriate box below:

- ☐ Spouse was not employed and had no income earned from work in 2023.
- ☐ Spouse was employed in 2023 and have listed below the names of all employers, the amount earned from each employer in 2023, and whether an IRS W-2 form or an equivalent document is provided. List every employer even if the employer did not issue an IRS W-2 form. If additional space is needed, provide a separate page which includes the student's name and MBU ID.

Employer's Name	IRS W-2 or Equivalent Document Provided by Employer?	Annual Amount Earned in 2023
		\$
		\$
		\$
		\$
Total Amount of Income Earned from Work		\$

Step 3: Non-Tax Filer Statement if income earned in 2023

Provide a signed and dated statement certifying that the individual(s) has not filed and is not required to file a 2023 income tax return, as well as the sources of 2023 income earned from work and the amount of income from each source.

_____ Check here if non-filing statement is provided.

_____ Check here if non-filing statement will be provided later.

Step 4: Submit copies of all 2023 W-2 Forms issued to the student and spouse (if applicable) who had any income in 2023.

Additional documentation may be requested by the financial aid office upon review of your worksheet and income information.

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

Student Signature (Required)

Date

Spouse Signature (If applicable)

Date

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

Student Name _____

MBU ID _____

Instructions: Complete Section A or Section B.

Section A: CAN YOU APPEAR IN PERSON AT MARY BALDWIN UNIVERSITY? YES - Complete only Section A in person at MBU

The student must appear in person at the Mary Baldwin University Office of Financial Aid to verify his/her/their identity by presenting an unexpired government-issued photo identification (ID), such as (but not limited to) a driver's license, other state-issued ID, or passport.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

Statement of Educational Purpose	Office of Financial Aid Use Only
I certify that I, _____, am the individual (Print Student's Name)	Valid Government-issued Photo Identification presented: _____
signing this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Mary Baldwin University for 2024-2025.	Date Received: _____
_____ (Student Signature)	Received By: _____
_____ (Date)	

Section B: CAN YOU APPEAR IN PERSON AT MARY BALDWIN UNIVERSITY? NO - Complete only Section B in the presence of a Notary

If the student is unable to appear in person at Mary Baldwin University to verify his/her/their identity, the student must provide to the institution:

- A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as, but not limited to, a driver's license, other state-issued ID, or passport, AND
- The ORIGINAL Statement of Educational Purpose provided below, signed in the presence of a notary. The form must be notarized. We cannot accept anything other than the original form.

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 Mary Baldwin University for 2024-2025.	
_____ (Student Signature)	_____ (Date)

Notary's Certificate of Acknowledgement

State of _____ City/County of _____

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

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

identification _____, to be the
(Type of government-issued photo ID provided)

above-named person who signed the foregoing instrument.

WITNESS my hand and official seal

(Notary signature) My commission expires on _____
(Date)

(SEAL)