

Your FAFSA has been selected by the U.S. Department of Education for a process called Verification. We must compare the information from your FAFSA with the information on this worksheet and any other required documents. If there are differences, we will make the necessary corrections to your FAFSA or contact you for further information.

## Student Information

First Name	M.I.	Last Name	Date of Birth
Street Address (not campus address)			Email Address
City	State	Zip Code	Phone Number

## Family Household Information

List all the people in your household. **INCLUDE:**

- Yourself, and your spouse if married.
- Your or your spouse’s children **IF** you or your spouse will provide more than half of the children’s support from July 1, 2025 through June 30, 2026, even if a child does not live with you.
- Other people if they now live with you **AND** you or your spouse provides more than half of their support, **AND** will continue to provide more than half of their support from July 1, 2025 through June 30, 2026.

**WRITE THE NAME OF ALL HOUSEHOLD MEMBERS BELOW, along with their age and relationship to the student.**

The provided criteria for “dependent children” or “other persons” mirror the requirement that family size align with those the student could claim as a dependent on a U.S. tax return if the student were to file a U.S tax return at the time of completing the 2025-2026 FAFSA. As a result, the student should not include any unborn children in the family size. If more space is needed, provide a separate page with the student’s name and ID number at the top.

First and Last Name of Each Household Member	Age	Relationship to Student
		<i>Self</i>

## How to Provide Tax Data to the Financial Aid Office

Use one of the following methods to provide your 2023 tax information to the Financial Aid Office. Tax information is **REQUIRED** for the student and spouse (if the student is married), and for the student if the student filed a tax return. Indicate which method(s) were used on the next page.

1. **Provide Consent and Approval in FAFSA:** \*preferred method\*  
 If you and possibly your spouse, didn’t provide proper [consent and approval to retrieve IRS tax information](#) via the FA-DDX when the 2025-2026 FAFSA was first submitted, login to the student’s processed FAFSA to make corrections using this [video](#) for help. FAFSA updates should be received by the Financial Aid Office within 2-3 business days. In most cases, no further documentation is needed to verify 2023 income information that was transferred into the student’s FAFSA using income and tax information directly from the IRS via the FA-DDX.

**2. Request a 2023 Tax Return Transcript from the IRS:**

If 2023 income tax return information for you or spouse if married was not transferred via the FA-DDX and considered verified, a **2023 IRS Tax Return Transcript(s)** is required. A Tax Return Transcript is an official record of the information on your federal tax return. Transcripts can be requested for free online at [www.irs.gov](http://www.irs.gov) under “Get Your Tax Record” or by calling 1-800-908-9946. Be sure to order a tax “return transcript”, **not** an account transcript. Transcripts must be requested using the SSN, date of birth, and address for the primary taxpayer (the taxpayer whose name is listed first on the federal tax return). You can opt for your tax return transcript to be mailed to you, then you send into school, or you can get your tax return transcript online using the [ID.me IRS Help Site](http://ID.me).

**3. Provide a copy of your entire 2023 Federal Tax Return:**

Provide a copy of your complete, signed 2023 Federal Tax Return, including all pages, schedules, forms, and all W-2s.

**4. Request a Verification of Non-filing letter from the IRS:**

If the student or spouse did not file a tax return in 2023, you are required to provide Verification of Non-filing. A Verification of Non-filing letter can be requested for free online at [www.irs.gov](http://www.irs.gov) under “Get Your Tax Record” or by mail using IRS Form 4506-T and checking box 7.

**STUDENT Tax Data and Income Information** (check one box)

- Check here if the student used method **1**: Provided proper [consent and approval to retrieve IRS tax information](#) via the FA-DDX for 2023 income information into the FAFSA **and** did not make changes to the FAFSA When submitting. *(Not available if married filing separately.)*
- Check here if the student used method **2**: You have attached a copy of your complete 2023 IRS Tax Return Transcript. **Write the student’s name on the top of the transcript.**
- Check here if the student used method **3**: You have attached a **signed** copy of your entire 2023 Federal Tax Return, including all pages, schedules, forms, and all W-2s.
- Check here if the student used method **4**: You did not file and are not required to file a 2023 Federal Tax Return. If you had earned income in 2023, list your employer(s) and any earnings received in 2023 in the table below. **Attach a copy of your W-2 form from each employer.** If the student had no earned income in 2023, write NONE. **You must also submit a Verification of Non-filing letter from the IRS.**

Employer’s Name	2023 Amount Earned	W-2 Attached?

**If Married and Filed Separately: SPOUSE Tax Data and Income Information** (check one box)

- Check here if this section does not apply to you.
- Check here if the spouse used method **2**: You have attached a copy of your complete 2023 IRS Tax Return Transcript. **Write both the student’s name and spouse’s name on the top of the transcript.**
- Check here if the spouse used method **3**: You have attached a **signed** copy of your entire 2023 Federal Tax Return, including all pages, schedules, forms, and all W-2s.
- Check here if the spouse used method **4**: You did not file and are not required to file a 2023 Federal Tax Return. If you had earned income in 2023, list your employer(s) and any earnings received in 2023 in the table below. **Attach a copy of your W-2 form from each employer.** If the spouse had no earned income in 2023, write NONE. **You must also submit a Verification of Non-filing letter from the IRS.**

Employer’s Name	2023 Amount Earned	W-2 Attached?

## Identity and Statement of Educational Purpose

**Option 1.** The student must appear in person Winona or Minneapolis Campus and present the following documentation to an institutionally authorized individual:

- A valid, unexpired government-issued photo identification, such as but not limited to a driver's license, non-driver's license, military identification, or passport (a copy will be made and retained by the school); **AND**
- A signed statement certifying that the Federal student financial assistance received will only be used for educational purposes to pay the cost of attending this school for the 2025-2026 award year. **[Attachment A]**

**Option 2.** If the student is unable to appear in person, he or she must provide the school with the following documentation:

- A copy of a valid, unexpired government-issued photo identification, such as but not limited to a driver's license, non-driver's license, military identification, or passport; **AND**
- An original notarized statement signed by the applicant certifying that the Federal student financial assistance received will only be used for educational purposes to pay the cost of attending this school for the 2025-2026 award year. **We cannot accept photocopies, faxes, or emails; we must receive the original signed, notarized form. [Attachment B]**

## Sign the Worksheet

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

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

\_\_\_\_\_  
Student Signature REQUIRED

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature

\_\_\_\_\_  
Date

**Return to:**    **Minneapolis:**    Saint Mary's University, Financial Aid Office, 2500 Park Avenue, Minneapolis, MN 55404

**Winona:**                    Saint Mary's University, Financial Aid Office, 700 Terrace Heights #5, Winona, MN 55987

# Identity and Statement of Educational Purpose (To Be Signed at the Institution)

The student must appear in person at Saint Mary's University of Minnesota to verify his or her 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.

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

## Statement of Educational Purpose

I certify that I \_\_\_\_\_ am the individual  
(Print Student's Name)

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 Saint Mary's University of Minnesota for 2025-2026.

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

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

\_\_\_\_\_  
(Student's ID Number)

\*\*\*\*\*

*Financial Aid Office use only:*

*ID Type copied:* \_\_\_\_\_ *(unexpired valid government-issued photo ID)*

*Received and witnessed by:* \_\_\_\_\_

*Date:* \_\_\_\_\_

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

If the student is unable to appear in person at Saint Mary's University of Minnesota to verify his or her identity, the student must provide to the institution:

(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.

## Statement of Educational Purpose

I certify that I \_\_\_\_\_ am the individual  
(Print Student's Name)

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 Saint Mary's University of Minnesota for 2025-2026.

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

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

\_\_\_\_\_  
(Student's ID Number)

## 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)