

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, 2026 through June 30, 2027, even if a child does not live with you.
- Other people, if they now live with you **AND** you or your spouse provide more than half of their support **AND** will continue to provide more than half of their support from July 1, 2026 through June 30, 2027.

**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 2026-2027 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 2024 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. Student and Spouse (if married and filed separately) may use different methods as appropriate but only one method may be used per student and per spouse.

**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 2026-2027 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 2024 income information that was transferred into the student’s FAFSA using income and tax information directly from the IRS via the FA-DDX.

- STUDENT:** Check here if the student’s income (if applicable) was successfully transferred into the student’s FAFSA using 2024 income and tax information directly from the IRS via the FA-DDX **and** no changes were made to the FAFSA after the retrieval tool was used.

- SPOUSE (if married and filed separately):** Check here if the spouse’s income was successfully transferred into the student’s FAFSA using 2024 income and tax information directly from the IRS via the FA-DDX **and** no changes were made to the FAFSA after the retrieval tool was used.

**2. Request a 2024 Tax Return Transcript from the IRS:**

If 2024 income tax return information for you or spouse if married was not transferred via the FA-DDX and considered verified, a **2024 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](https://www.irs.gov/efile).

- STUDENT:** Check here if you (the student), if applicable, attached a copy of your complete 2024 IRS Tax Return Transcript. **Write the student’s name on the top of the transcript.**
- SPOUSE (if married and filed separately):** Check here if your spouse attached a copy of their complete 2024 Federal Tax Return Transcript. **Write both the student’s name and spouse’s name on the top of the transcript.**

**3. Provide a copy of your entire 2024 Federal Tax Return:**

Provide a copy of your complete, signed 2024 Federal Tax Return, including all pages, schedules, forms, and all W-2s.

- STUDENT:** Check here if you (the student), if applicable, attached a **signed** and dated copy of your entire 2024 Federal Tax Return (including applicable schedules) including all pages, schedules, forms, and all W-2s.
- SPOUSE (if married and filed separately):** Check here if your spouse has attached a **signed** and dated copy of their entire 2024 Federal Tax Return (including applicable schedules), 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 2024, 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:** Check here if the student did not file and is not required to file a 2024 Federal Tax Return. If you had earned income in 2024, list your employer(s) and any earnings received in 2024 in the table below. **Attach a copy of your W-2 form from each employer.** If the student had no earned income in 2024, write NONE.

Employer’s Name	2024 Amount Earned	W-2 Attached?

- SPOUSE (if married and filed separately):** Check here if your spouse did not file and are not required to file a 2024 Federal Tax Return and have attached a copy of their Verification of Non-filing letter from the IRS. If your spouse had earned income in 2024, list your employer(s) and any earnings received in 2024 in the table below and **attach a copy of your W-2 form from each employer.** If your spouse had no earned income in 2024, write NONE.

Employer’s Name	2024 Amount Earned	W-2 Attached?

**Sign the Worksheet**

Each person signing below certifies that all verification documents submitted with this certification are complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

**Digital/typed signatures are not accepted.**

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  
**Email:** financialaid@smumn.edu **Fax:** 507-457-6997