



2015-2016 Independent Student Verification Form (Group V1)

Your FAFSA (Free Application for Federal Student Aid) has been selected under federal regulations for verification. The verification process will be conducted by SMU in accordance with the U. S. Dept. of Education's Verification Regulations (Title 34 CFR 668, Subpart E). Failure to complete verification will delay awarding and disbursement of funds to your student account. If any additional information is needed to resolve conflicting or unclear data, you will be notified by the SMU Financial Aid office.

Mail: SMU Financial Aid
Division of Enrollment Services
P. O. Box 750181, Dallas, TX 75275-0181

Email: FA.Verification@mail.smu.edu

In person: at the Financial Aid Front Desk on the 1st floor of the Laura Lee Blanton Bldg.

STEP 1: STUDENT INFORMATION

Last name	First name	MI	SMU ID Number	Last 4 digits of SSN
Home Address (number, street, city, state, zip code)			Student E-mail Address	Phone Number

STEP 2: NUMBER IN HOUSEHOLD & NUMBER IN COLLEGE

In the table below, please list the members of your household as described by FAFSA rules:

- ☒ **Yourself**
- ☒ **Your spouse**, if you are married.
- ☒ **Your children or your spouse's children**, if you or your spouse will **provide over 50% of their support** from now through June 30, 2016, **even if the children do not live under the same roof as you**.
- ☒ **Any other people** that reside with you (and your spouse if married), and **receive over 50% of their support** from you (and/or your spouse) from now through June 30, 2016.
- ☒ **The college/university/postsecondary institution** for any household member who will be **enrolled at least ½ time** from July 1, 2015 through June 30, 2016.

Full Name	Age	Relationship	Current College/Univ./Inst.
1.		Self	SMU
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

In nearly all cases, only the IRS Data Retrieval tool or Tax Return Transcript will be accepted for verification. Please review the criteria below; if any apply, you will be ineligible to use the Data Retrieval Tool:

- Filed an amended 2014 tax return (IRS Form 1040X)
- Filed a foreign or Puerto Rican 2014 tax return
- Had a change in marital status after December 31st, 2014
- You're married, but filed as "Head of Household" or "Married filing separately"
- You selected "Unmarried, Living Together" on the FAFSA
- Entered an invalid SSN on the FAFSA, or entered it as all 0's

To use Tool: go to FAFSA.gov, log in w/ your PIN. Generally, IRS Data is available 1-3 weeks if e-filed; 8-11 weeks otherwise (depends on balance owed & refund).

If you are ineligible or choose not to use the Data Retrieval Tool, you must request an IRS Tax Return Transcript: www.irs.gov/Individuals/Get-Transcripts or 800-908-9946. Send **ALL** pages, **front and back**. Save a copy for your records before sending to SMU.



STEP 3: STUDENT and SPOUSE TAX INFO - ONLY COMPLETE ONE SECTION BELOW (A, B OR C) AND PROCEED TO STEP 4.

SECTION A. If 2014 taxes have already been filed, check only one box in Options 1, 2, or 3 and proceed to STEP 4.

OPTION 1 - IRS DATA RETRIEVAL TOOL

- ☐ I have already used the IRS Data Retrieval Tool for my (and my spouse's if applicable) tax info.
☐ I will make a FAFSA correction and use the IRS Data Retrieval Tool as soon as possible.

OPTION 2 - IRS TAX RETURN TRANSCRIPT

- ☐ My IRS Tax Return Transcript is attached (as well as my spouse's if applicable).
☐ I have ordered an IRS Tax Return Transcript(s) and it is being sent to SMU.

OPTION 3 - AMENDED TAX RETURN

- ☐ I have filed an Amended Tax Return; my (and my spouse's if applicable) signed Form 1040 AND 1040X are attached.
☐ I have filed an Amended Tax Return; my (and my spouse's if applicable) signed Form 1040 AND 1040X will be sent to SMU as soon as possible. (Note – in lieu of a 1040, you may send a Tax Return Transcript, but the 1040X must also be sent).

SECTION B. If required to file taxes, but have not yet filed, check only one box in Options 1, 2, or 3 and proceed to STEP 4.

OPTION 1 - TAX EXTENSION - CHECK ONE BOX BELOW:

- ☐ I (and/or my spouse) has/have been granted a tax extension. I have attached my Form 4868 AND all my Form W-2(s) and/or Form 1099-MISC(s).
☐ I (and/or my spouse) am SELF-EMPLOYED and have been granted a tax extension. I have attached my Form 4868 AND written my estimated 2014 AGI and Taxes Paid here: 2014 AGI: \$ _____ 2014 Taxes Paid \$ _____ (use IRS Form 1040-ES).

OPTION 2 - IRS DATA RETRIEVAL TOOL

- ☐ I (and/or my spouse) have been granted an extension by the IRS; I will make a FAFSA Correction and use the Data Retrieval Tool as soon as I file my taxes.

OPTION 3 - IRS TAX RETURN TRANSCRIPT

- ☐ I (and/or my spouse) have not been granted an extension by the IRS; I will request an IRS Tax Return Transcript as soon as I file my taxes.

SECTION C. If not required to file according to IRS rules, complete Option 1 or 2 and proceed to STEP 4.

OPTION 1 – WAGES EARNED IN 2014 – Complete the table below AND attach all of the Form W-2's provided to you:

Name of Employer or Source of Income	2014 Wages earned	W-2 provided?	W-2 Attached?
	\$		
	\$		
	\$		

OPTION 2 – NO WAGES EARNED IN 2014

- ☐ Check here certifying that you (AND your spouse, if applicable) earned \$0 in wages for calendar year 2014.

STEP 4: RECEIPT OF SNAP BENEFITS Please certify below if someone listed in the household section in Step 2 received SNAP benefits (the Supplemental Nutrition Assistance Program, formerly known as Food Stamps) in 2013 or 2014 (circle yes or no): **YES / NO**

STEP 5: CHILD SUPPORT PAID Please certify below if you or your spouse paid child support to someone outside of your household in 2014. (circle yes or no): **YES / NO**

If YES, please complete the fields below:

Name of the adult paying child support	
Name of the adult to whom child support was paid	
Name <u>and</u> Age of the child(ren) for whom child support was paid	1.
	2.
	3.
	4.
The amount of child support paid	\$

STEP 6: CERTIFICATIONS AND SIGNATURES

SIGNING BELOW CERTIFIES THAT ALL INFORMATION PROVIDED HEREIN IS COMPLETE AND ACCURATE.

Student Name (print) and Signature _____

Date _____

Spouse Name (print) and Signature _____

Date _____

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