

UNIVERSITY OF MOUNT SAINT VINCENT

2026-2027 Verification Worksheet (V5)

Your application was selected by the U.S. Department of Education for review in a process called "Verification." The Office of Financial Aid must compare your FAFSA with the information you provide on this worksheet and other financial documents. If there are differences between your application information and the documents you submit, your application may require correction. **The Office of Financial Aid cannot make any federal financial aid payments available to you or process a student loan request until all verification requirements have been met and the necessary corrections have been made.**

Next Steps

- 1. On the FAFSA, make sure all contributors gave consent for data sharing between the IRS and Federal Student Aid.** All individuals who contribute information to the FAFSA (contributors), including students, spouses (if married), and parents (if dependent) **MUST** provide consent on the FAFSA to allow the IRS to share their tax information with Federal Student Aid via the Direct Data Exchange (FA-DDX), if eligible.
- 2. If a contributor to the FAFSA is not eligible to have their tax information shared via the FA-DDX, they must submit a 2024 Tax Return Transcript** from the Internal Revenue Service or a **signed copy of the 2024 Federal 1040 Tax Return Form** to the school. Contributors may order a 2024 Tax Return Transcript online at: <https://www.irs.gov/individuals/get-transcript>
- 3. Complete all sections and sign this worksheet in ink.** Only V5 selected students can present their requested documents in person.
- 4. If a V5 selected student is not able to present in person** notarized documentation can be submitted by uploading through SLATE or Self-Service.

A. Student Information (Please print)

Last Name	First Name	Middle Initial	UMSV ID #
Address (include apt. #)		Date of Birth (mm/dd/yyyy)	
City	State	ZIP Code	Phone # (incl. Area code)

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B. Family Information (Please Print)

PLEASE READ THESE INSTRUCTIONS CAREFULLY. The rules for family size on the FAFSA have changed.

Independent Students: List the people in your family size during the July 1, 2026 to June 30, 2027 award year. Include yourself, your spouse (if you are married but not permanently separated), and include your children **IF** they live with you (except for temporary absences such as college enrollment, military service, illness, injury, etc.) **AND** they receive more than half of their financial support from you **AND** they will continue receiving more than half their support from you during the award year. Include other people in your family size **only** if they live with you **AND** you provide more than half their financial support **AND** will continue to provide more than half their financial support through June 30, 2027.

Dependent Students: List the people in your parent(s) family size during the July 1, 2026 to June 30, 2027 award year. Include yourself, the parent who contributed information to your FAFSA, as well as the current partner or spouse of that parent, if they live in the same home, and other children **IF** they live with your parent(s) (except for temporary absences such as college enrollment, military service, illness, injury, etc.) **AND** they receive more than half of their financial support from your parent(s) **AND** they will continue receiving more than half their support from your parent(s) during the award year. Include other people in your parent(s) family size **only** if they live with your parent(s) **AND** your parent(s) provide more than half their financial support **AND** will continue to provide more than half their financial support through June 30, 2027.

Last Name, First Name, Middle Initial	Age	Relationship

If you need more space, attach a separate page. Note: We may require additional documentation.

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C. Tax Forms & Income Information (Please Print)

☐ Check here if you and/or your parent(s) **taxes are not required** because *IRS tax data was shared with Federal Student Aid via the Direct Data Exchange (FA-DDX)*.

☐ Check here if you are attaching your **2024 IRS Tax Return Transcript** or a **Signed Copy of 2024 Federal Tax Return (1040) with its schedules**.

Below, please list any person **who did not** or were not required to file taxes for 2024 but had income from working. A W-2 must be submitted for each source of income. Parents/independent students must also submit a signed and dated statement certifying: 1) that the individual is not required to file a 2024 income tax return; and 2) that the sources and amounts of earnings, other income, and resources that supported the individual(s) for the 2024 tax year.

Name of Non-Tax Filer in 2024	Name of Employer	Income Amount with W2

D. Identity & Statement of Educational Purpose

Student must provide proof of his/her Identity by presenting a valid and unexpired government-issued photo identification (ID) such as, but not limited to, a driver's license, other state-issued ID, or passport.

You may choose option 1 or 2.

1. You may provide proof by presenting an original, unexpired, government-issued photo identification at the Financial Aid Office. The Financial Aid Professional who accepts the document will make an annotated photocopy of your ID for our records and sign below.

OR

2. If you are unable to present the document in person. You may provide a copy of the original, unexpired, government-issued photo identification, **annotated** by the notary, and acknowledged within the notary statement below.

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Statement of Educational Purpose

The student must sign, in the presence of an institutional official (option 1) OR a notary (option 2), the following:

I certify that I (Print Student Name) _____ am the individual 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 University of Mount Saint Vincent for 2026–2027.

Student Signature _____

Date _____

E. Acknowledgement by FA Professional OR Notary

Financial Aid Professional's Certificate of Acknowledgement (Must be completed for option 1)

The student, (student name) _____, signed the Statement of Educational Purpose above in my presence and provided to me their (ID type) _____ with expiration date _____ as proof of identity. I have saved an annotated copy of this student ID in the student's file.

Financial Aid Professional Signature _____

Date _____

--- OR ---

Notary's Certificate of Acknowledgement (Must be completed for option 2)

State of _____ City/County of _____

On (date), _____ before me (Notary Name), _____

personally appeared (Student Name) _____ and proved to me because of

satisfactory evidence of identification* _____ to be the
(type of unexpired government issued photo ID provided)

above-named person who signed the foregoing instrument.

**WITNESS my hand and official seal
(Seal)**

Notary Signature _____

My commission expires on (date) _____

***Notary: Please provide an annotated copy of the ID presented by the student.**

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F. Certification

By signing this worksheet, I [we] certify that all the information reported on this worksheet is complete and correct. If dependent, *at least one parent must sign*. **Warning: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

Student Signature

Date

Parent Signature (Dependent student) or Spouse Signature

Date