

6965 Cumberland Gap Parkway

Harrogate, TN 37752 Phone: 423.869.6336 Fax: 423.869.6347

2025-2026 V5 Independent Verification Worksheet

<u>What is Verification?</u> – The Department of Education randomly selects a percentage of students for verification. Before awarding Federal Student Aid, we must collect documentation to verify the information reported on your FAFSA. We may correct your FAFSA based on your provided documentation if there are discrepancies. During the verification process, it may be determined that additional documents are needed.

<u>Instructions:</u> Read this worksheet thoroughly and answer all questions. Your student ID number can be found in MyLMU > "Self Service Menu" > "WebAdvisor for Students" > "My Profile." Return the worksheet and all requested documentation to the Office of Student Financial Services as soon as possible to prevent financial aid processing delays.

As part of federal student aid eligibility, students and spouses (as appropriate) will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the student and spouse filed separate 2023 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2023 income information that was transferred into the student's FAFSA using the income and tax information directly from the IRS via the FA-DDX.

If 2023 income tax information for the student (or spouse, if applicable) was not transferred via the FA-DDX and considered verified, the student should provide the institution with a 2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules.

A 2023 IRS Tax Return Transcript may be obtained through:

A. Student Information

- <u>Get Transcript by Mail</u> Go to <u>www.irs.gov</u>, 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.
- <u>Get Transcript Online</u> Go to <u>www.irs.gov</u>, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript." Follow the instructions to create an ID.me account if you do not already have one. If you need help creating an ID.me account or verifying your identity, visit <u>help.id.me</u>.
- <u>Automated Telephone Request</u> 1-800-908-9946. The transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- <u>Paper Request Form</u> 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.

Student Name Date of Birth LMU Student ID Number Address City State Zip Phone (include area code)

Student Name:	Student ID #:		Independent V5
P. Family Siza			
B. Family Size			
List the people in your household, including:			
• The student.			
The student's spouse, if applicable.			
 The student's dependent children if all of the following 	g are true:		
 They live with the student (or live apart because) 	_	llment),	
 They receive more than half of their support 	_	· · · · · · · · · · · · · · · · · · ·	
 They will continue to receive more than half or 	of their support fro	m the student from July 1	, 2025, through June 30, 2026
 Other persons if the following are true: 			
 They live with the student, 			
 They receive more than half of their support 			
 They will continue to receive more than half or 	of their support fro	m the student from July 1	, 2025, through June 30, 2026
The provided criteria for "dependent children" or "other postudent could claim as a dependent on a U.S. tax return if t 2025-2026 FAFSA. As a result, the student should not inclu	the student were to	o file a U.S. tax return at tl	•
Provide a separate page with the student's name and ID nu	umber at the top if	additional space is neede	d.
Full Legal Name	Age		
		nt, and from the student from July 1, 2025, through June 30, 2026 int, and from the student from July 1, 2025, through June 30, 2026 the requirement that family size align with those the re to file a U.S. tax return at the time of completing the children in the family size.	
C. Student Tax Information			
 Did you (the student) file a 2023 Federal Tax Return? YES. While completing the FAFSA, if you consented a documents are needed. If the FA-DDX transfer was ineffyour 2023 Federal Tax Return along with <u>ALL</u> applicable NO. I did not, will not, and was not required to file a 	and the FA-DDX pull ective, you must su schedules. <i>(Skip to</i>	bmit a 2023 IRS Tax Return section D.)	Transcript <u>OR</u> a signed copy of
2. TAX RETURN NON-FILERS ONLY — Complete this section return with the IRS. Check all boxes that apply: I was not employed and had no income earned from I was employed in 2023. Please complete the table leven if the employer did not issue a W-2 form. (Attach a I had other sources of income. Please complete the resources that were used to support you in 2023. (Attach	n work in 2023. below and attach co another sheet if ado table below and lis	opies of all W-2s. List every litional space is needed.) t the sources and amounts	employer, of earnings, other income, and
Employer(s) Name or Other Source of Income		2023 Amount Earned	W-2 Attached?
	\$		
	\$		
	\$		
Signature of Student (only if tax return non-filer):			Pate:

Student Name:	Student	ID #:	Independent V5
D. Spouse Tax Information (if applied	rahle)		
D. Spouse Tax Information (ii applie	Subje		
Spouse Name:			
1. Did the student's spouse file a 202			
YES. While completing the FAFSA		DDX pulled over your Federal Tax	Information, no additional tax
documents are needed. If the FA-DD			rn Transcript <u>OR</u> a signed copy of
your 2023 Federal Tax Return along v DNO. I did not, will not, and was no			answer auestion 2 and sian.)
	or required to the a 2020 moon	te tax retain with the mo. proude	answer question 2 and signif
 TAX RETURN NON-FILERS ONLY – Conwith the IRS. Check all boxes that app 		e will not file and is not required	to file a 2023 income tax return
☐ I (the spouse) was not employed	•	m work in 2023.	
\square I (the spouse) was employed in 20			V-2s. List every employer,
even if the employer did not issue a \		The state of the s	
☐ I (the spouse) had other sources income, and resources that were use			
Employer(s) Name or Othe	r Source of Income	2023 Amount Earned	W-2 Attached?
		\$	
		\$	
Signature of Spouse (only if tax retur	n non-filer):		Oate:
E. Certifying Signature			
By signing below, I (the student) certify that	t all the information reported	is complete and correct 1/the st	udant) also understand that if
any of the information reported on this for			
be required. WARNING: If you purposely g		•	•
both.			
Student's Signature (Legal Name)		Da	te
	TO RETURN T	HIS FORM:	
	Mail to: Lincoln Memor	ial University nt Financial Services	
	6965 Cumberla	nd Gap Parkway	
	Harrogate, TN	3//52	
		nt Financial Services Hall – Main Campus	

udent Name:				t ID #:		Independent
F. Identity/Statement of Educa	ational P	urpose				
structions: Read this worksheet the	oroughly a	nd answer all ques	tions. \	Your student ID number car	<mark>ո be fo</mark> ւ	und in MyLMU > "Self Service
enu" > "WebAdvisor for Students"						
nancial Services) to verify their iden	ntity by pre	esenting an unexpir	red vali	id government-issued phot	o ident	ification (ID), such as, but no
nited to, a driver's license, other sta				• • • • • • • • • • • • • • • • • • • •		·
e institution with the date it was re						
dition, the student must sign, in the	e presenc	e of the institution	al offici	ial, the Statement of Educa	tional P	urpose provided below.
the student is <u>unable to appear in p</u>	person at l	incoln Memorial U	Iniversi	tv to verify their identity. t	he stud	ent must provide the origina
ned and notarized Statement of Ec						-
knowledged in the notary statemer	nt below.	The completed wo	rksheet	t must be mailed to the offi	ice of St	tudent Financial Services.
tudent Information						
urdont Nomo		Date of Divith		I BALL Student ID Number		Dhana /ingludo oros codo
tudent Name		Date of Birth		LMU Student ID Number	er	Phone (include area code
ddress			City		State	e Zip
ertify that I	pose	s Name)		am the individual signir	ng this	Statement of Educational
ertify that I(Pr (Pr Irpose and that the Federal stude st of attending Lincoln Memorial	rint Student' ent financi	al assistance I may	y recei	_		
ertify that I(Pr (Pr Irpose and that the Federal stude st of attending Lincoln Memorial	rint Student' ent financi	al assistance I may		ve will only be used for ed	ducatio	
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Official's Name: _____ Date: _____ Date: _____