

PEPPERDINE | SCHOOL OF PUBLIC POLICY

2021–2022 V5 Aggregate Verification Worksheet Independent Student

Your 2021–2022 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this institutional verification document, attach any required documents, and submit the form and other required documents to us. We may ask for additional information. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

Student’s Information

| | | | |
|---|------------|--|-----------------------|
| Student’s Last Name | First Name | M.I. | Campus Wide ID (CWID) |
| Student’s Street Address (include apt. no.) | | Student’s Date of Birth | |
| City State Zip Code | | Student’s Email Address | |
| Student’s Home Phone Number (include area code) | | Student’s Alternate or Cell Phone Number | |

Student’s Family Information

In the table below list the people in your household. Include:

- Yourself.
- Your spouse, if you married.
- Your children if you or your spouse will provide more than half of their support from July 1, 2021, through June 30, 2022, even if the children do not live with you.
- Other people if they now live with you and you or your spouse provides more than half of your support and will continue to provide more than half of your support through June 30, 2022.

For any household member who will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2021, and June 30, 2022, include the name of the college.

If more space is needed, provide a separate page with the student’s name and ID number at the top.

| Full Name | Age | Relationship | College | Will be Enrolled at Least Half Time (Yes or No) |
|-----------|-----|--------------|-----------------------|---|
| | | Self | Pepperdine University | |
| | | | | |
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| | | | | |

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

Student's Name: _____ CWID _____

Verification of 2019 Income Information for Student Tax Filers

Important Note: The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2019 or had a change in marital status after December 31, 2019.

Instructions: Complete this section if the student and spouse filed or will file a 2019 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](https://fafsa.gov).* In most cases, no further documentation is needed to verify 2019 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

- The student has used the IRS DRT in *FAFSA on the Web* to transfer 2019 IRS income tax return information into the student's FAFSA.
- The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2019 IRS income tax return information into the student's FAFSA.
- The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the institution with a **2019 IRS Tax Return Transcript(s) or a signed copy of the 2019 income tax return and applicable schedules**.

A **2019 IRS Tax Return Transcript** may be obtained through:

- **Get Transcript by Mail** – Go to www.irs.gov, 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.
- **Get Transcript Online** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **Automated Telephone Request** – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** – 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.

If the student and spouse filed separate 2019 IRS income tax returns, the IRS DRT cannot be used and the **2019 IRS Tax Return Transcript(s) or a signed copy of the 2019 income tax return and applicable schedules** must be provided for each.

___ Check here if a **2019 IRS Tax Return Transcript(s) or a signed copy of the 2019 income tax return and applicable schedules** is provided.

___ Check here if a **2019 IRS Tax Return Transcript(s) or a signed copy of the 2019 income tax return and applicable schedules** will be provided later.

Verification of 2019 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2019 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2019, must provide:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2019;
- Verification of Non-filing (VNF) Letter (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2020 or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2019 and,
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2019.

Note: An individual granted a filing extension beyond the automatic six-month extension may be required to submit tax information using the IRS Data Retrieval Tool, by obtaining a transcript from the IRS, or by submitting a copy of the income tax return and the applicable schedules that were filed with the IRS that lists 2019 tax account information.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2019 must provide a signed copy of the 2019 IRS Form 1040X,

Financial Aid Officer Name Printed _____

Financial Aid Officer Title _____

Financial Aid Officer Signature _____

Date _____

IF YOU ARE UNABLE TO APPEAR IN PERSON:

- 1. Complete this section in the presence of a notary public.
- 2. You must also provide our Office a copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to, a driver’s license, other state-issued ID, or passport. The following ID cards will not be accepted: military, SNAP, foreign, and student ID issued by a state school.

STATEMENT OF EDUCATIONAL PURPOSE

I certify that I, _____ (print student’s full 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 Pepperdine University, School of Public Policy, for 2021-2022.

Student’s Signature _____

Date _____

CWID Number _____

Notary’s Certificate of Acknowledgement

Notary’s certification may vary by State

State of _____

City/County of _____

On _____, before me, _____,

(Date)

(Notary’s name)

personally appeared, _____, and proved to me

(Printed name of signer)

because of satisfactory evidence of identification _____

(Type of unexpired 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)

Certifications and Signatures

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

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

Print Student’s Name _____

Campus Wide ID (CWID) _____

Student’s Signature (Required) _____

Date _____

Spouse’s Signature (Optional) _____

Date _____

Submit this completed and signed document to:

Pepperdine University, School of Public Policy - Attn: SPP Financial Aid - 24255 Pacific Coast Hwy., Malibu, CA 90263-7493