

Student Name: _____

SSN (Last Four Digits) _____

C. Independent Student's Income Information To Be Verified

TAX RETURN FILERS — **Important Note:** The instructions below apply to you and your spouse, if you are married.

Current Marital Status (Please check one):

Single: _____ Married/Remarried: _____ (Date: _____) Separated: _____ (Date: _____)

Divorced: _____ (Date: _____) Widowed: _____ (Date: _____)

Important Note: If you or your spouse filed, or will file, an amended 2023 IRS tax return, a non-IRS Income Tax Return, were granted a filing extension by the IRS, or were the victim(s) of IRS tax-related identity theft you must contact the Office of Financial Aid before completing this section.

Instructions: Complete this section if you and your spouse filed or will file a 2023 IRS income tax return(s). As part of federal student aid eligibility, students and their spouses 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 income and tax information directly from the IRS via the FA-DDX.

If 2023 income tax return information for the student (or spouse, if applicable) was not transferred via the FA-DDX, the student should provide the institution with the following:

- A 2023 IRS Tax Return Transcript(s), or a signed copy of your 2023 federal income tax return and applicable schedules.

A 2023 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.

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TAX RETURN NON-FILERS— By completing this section, you certify that you (and/or spouse, if married) have **not filed** and are **not required** to file a 2023 income tax return, and you have listed all income earned from work, other income, and resources for the 2023 tax year.

Check the box that applies:

- You (and/or spouse if married) were not employed and had no income earned from work in 2023.
- You (and/or spouse if married) were employed in 2023 and has listed below the names of all employers, the amount earned from each employer in 2023, and whether an IRS W-2 form or an equivalent document is provided. Copies of all 2023 W-2 forms issued to you (and spouse if married) by employers must be provided. *List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, provide a separate page with the student’s name and ID number at the top.*

Employer’s Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2023
<i>(Example) ABC’s Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>
Total Amount of Income Earned From Work		\$

- You (and/or spouse, if married) had other income and recourses that supported you for the 2023 tax year. *List each source of income in the table below. If more space is needed, provide a separate page with the student’s name and ID number at the top.*

Source of Income	Annual Amount in 2023	
<i>(Example) Rental Property</i>	<i>\$4,500.00</i>	
Total Amount of Income		\$

You must provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2024 that indicates a 2023 IRS income tax return was not filed with the IRS or other relevant tax authority. An official IRS Letter of Non-Filing can be obtained at [irs.gov](https://www.irs.gov). If unable to obtain a Letter of Non-Filing, a signed and dated statement certifying that the individual has not filed and is not required to file a 2023 income tax return, as well as the sources of 2023 income earned from work and the amount of income from each source (listed above).

_____ **Check here if IRS confirmation of non-filing, or signed and dated statement is provided.**

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D. Identity and Statement of Educational Purpose – Must be signed at the Institution or in the presence of a Notary

To be signed at the Institution:

The student must appear in person at **Cleary University** to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver’s license, other state-issued ID, or passport. The institution will maintain a copy of the student’s photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student’s ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

To be signed in the presence of a Notary:

If the student is **unable** to appear in person at **Cleary University** to verify his or her identity, the student must provide to the Institution:

- A. A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver’s license, other state-issued ID, or passport; and
- B. The **original** Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

Statement of Educational Purpose

I certify that I _____ am the individual signing
(Print Student’s Name)

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

Cleary University for 2025–2026.

Student’s Signature

Date

Authorized Institutional Official’s Signature

Date

Student Name: _____ SSN (Last Four Digits) _____

Notary's Certificate of Acknowledgement Regarding Signed Statement of Educational Purpose on Page 4 of this Document:

State of _____ City/County of _____

On _____, before me, _____, personally
(Date) (Notary's name)

appeared, _____, and provided to me on basis of satisfactory
(Printed name of signer)

evidence of identification _____ to be the above-named person who
(Type of unexpired government-issued photo ID)
signed the foregoing instrument.

WITNESS my hand and official seal:

(Notary signature)

My commission expires on _____
(Date)

(Seal)

E. Certifications and Signature

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

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

Print Student's Name
(Blue or black ink, no electronic signatures accepted)

Student's Signature
(Blue or black ink, no electronic signatures accepted)

Date

***Submit the original worksheet to the financial aid administrator at your school.
No copies will be accepted.
You should make a copy of this worksheet for your records.***