Submission of Requested Documents

Due to recent guidance issued by the Federal Student Aid division of the Department of Education, we can no longer accept documentation with any Personally Identifiable Information (PII) via an unsecured email or fax. PII is any data that could potentially identify a specific individual or any information used to distinguish one person from another. This includes names, school IDs, SSNs, Dates of Birth, etc.

Therefore, we must ask that you submit documents that have been requested in one of the following ways:

By Mail:
Office of Financial Aid
Wofford College
429 N. Church Street
Spartanburg, SC 29303

In Person:
Bring your forms by our office.
We are upstairs from the Office of Admission in the Hugh S Black Administration Building.

Please contact our office should you have questions or concerns.

Thank you for understanding.
**WOFFORD COLLEGE**
Office of Financial Aid

2019-2020 INDEPENDENT AGGREGATE VERIFICATION WORKSHEET (V5)

Your 2019-2020 Free Application for Federal Student Aid (FAFSA) was selected for review by the Department of Education in a process called verification. Please complete this verification worksheet accurately, review the following instructions carefully and provide all required documentation. Attach all requested documents and respond to each item. If any of the information provided below differs from information reported on your 2019-2020 FAFSA, we will make the necessary corrections. The results of the verification process will be reported on your financial aid award letter. We will not be able to award you federal, state, or need-based institutional financial aid until you have provided all the information requested.

**Step 1: Student Information**

<table>
<thead>
<tr>
<th>Student Full Name (PLEASE PRINT)</th>
<th>W</th>
<th>XXX-XX-</th>
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</thead>
<tbody>
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**Step 2: Household Information**

<table>
<thead>
<tr>
<th>Full Name of Family Member</th>
<th>Relationship to student</th>
<th>Age</th>
<th>Name of College Attending in 2019-2020</th>
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<tbody>
<tr>
<td>Self</td>
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<td>Wofford College</td>
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In the chart below include the following:
- Yourself;
- Your spouse, if married;
- Your or your spouse’s children if
  - (a) you or your spouse will provide more than half of their support from July 1, 2019-June 30, 2020, even if the children do not live with the student, or
  - (b) the children would be required to provide parental information when applying for federal student aid;
- Other people if they now live with you and you or your spouse provides more than half of their support and will continue to provide more than half of their support from July 1, 2019-June 30, 2020.
- Write in the name of the college for any household member who will be attending at least half time between July 1, 2019 and June 30, 2020, and will be enrolled in a degree, diploma, or certificate program.
Step 3: Income Earned from Work

Did the student and/or spouse work in 2017? _____YES _____NO (If NO, skip to Step 4)

   Did the student and/or spouse receive a W2, Schedule C, Schedule F and/or Schedule K-1? _____YES _____NO

   If YES, submit a copy of each W2, Schedule C, Schedule F and/or Schedule K-1.

   If NO, complete the table below:

<table>
<thead>
<tr>
<th>Name of Student/Spouse</th>
<th>Employer’s Name</th>
<th>2017 Amount Earned</th>
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</tbody>
</table>

Step 4: Tax Filing Status

STUDENT
Did the student file taxes in 2017? _____YES _____NO

   If YES, follow the instructions on page 3 to submit your tax data.

   If NO, follow the instructions on page 3 to submit a Verification of Non-Filing Letter.

SPOUSE
Did one or both parents listed on page 2 file a 2017 tax return? _____YES _____NO

   If YES, follow the instructions on page 3 to submit your tax data.

   If NO, follow the instructions on page 3 to submit a Verification of Non-Filing Letter

(Continue to next page)
Step 5: High School Completion

Provide one of the following documents that indicate the student’s high school completion status when the student will begin college in 2019-2020:

- A copy of the student’s high school diploma.
- A copy of the student’s final official high school transcript that shows the date when the diploma was awarded.
- A copy of the student’s General Educational Development (GED) certificate or GED transcript.
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor’s degree.
- If State law requires a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential.
- If State law does not require a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a transcript or the equivalent, signed by the student’s parent or guardian, that lists the secondary school courses the student completed and documents the successful completion of a secondary school education in a homeschool setting.

If the student is unable to obtain the documentation listed above, contact the Financial Aid Office at finaid@wofford.edu.

Step 6: Identity/Statement of Educational Purpose Instructions

Identity and Statement of Educational Purpose

The student MUST appear in person at the Wofford College Financial Aid Office 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 with the date it was received and the name of the official at the institution authorized to collect the student’s ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided on page 4.

If the student is unable to appear in person at the Wofford College Financial Aid Office to verify his/her identity, the student must provide to the institution:

Identity and Statement of Educational Purpose
(To Be Signed in the Presence of a Notary)

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 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
(To Be Signed at the Institution or with a Notary)

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 Wofford

______________________________    _______________
(Student’s Signature)    (Date)

______________________________
(Student’s ID Number)

Notary’s Certificate of Acknowledgement

State of ____________________________________________________

City/County of ____________________________________________________________________

On___________________, before me, _________________________________________________
(Date) (Notary’s name, printed)

personally appeared, ____________________________________, and proved to me
(Printed name of signer)

on the basis 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)

I attest that the individual named above appeared in person and verified his/her identity with the valid, government issued ID copied above.

Print Name: _________________________________    Date: _________________________________

Signature: __________________________________________

Title: __________________________________________

Step 8: Certification

By signing this worksheet, we certify that all of the information reported above is true, complete and correct. Electronic signatures are not acceptable.

_________________________________________    _______________
(Student’s Signature)    (Date)

Page 4
Instructions for providing 2017 Tax Data

If you have filed a 2017 tax return, we must collect your tax data for verification purposes. If you have already used the IRS Data Retrieval Tool on the FAFSA, you do not need to supply us with your tax data. If not, please complete one of the following:

1. Directly through the FAFSA *Preferred Method*
   a. Data Retrieval Tool Instructions:
      Step 1: Log onto www.fafsa.gov using your FSA ID and Password.
      Step 2: Select “Make FAIFA Corrections”.
      Step 3: Create a “Save Key” and click next.
      Step 4: Navigate to the “Financial Information” tab at the top of the page.
      Step 5: Verify the answer to “Have you completed your IRS Income tax return” is “Already Completed” in the drop down menu.
      Step 6: Answer the question regarding your filing status.
      Step 7: Answer “No” to the next three questions, if no is the correct answer.
      Step 8: You will be leaving the FAFSA website temporarily. Click “OK”.
      Step 9: Enter the requested information. Click Submit. **The information should match what is listed on your 2017 tax return**
      Step 10: Check the box for “Transfer My Tax Information into the FAFSA” and click “Transfer Now”.
         **Please note: You will not be able to view or change any of the imported tax data**
      Step 11: Navigate to the bottom of the page and click “Next”.
      Step 12: Verify your changes and click “Next”.
      Step 13: You will be prompted to sign the FAFSA again. Click agree, sign at the bottom, then click “SUBMIT MY FAFSA NOW”.
         **Please note: It takes approximately 3 business days for Wofford to receive the updated FAFSA**

2. Directly from the IRS online at www.irs.gov
   a. Get Transcript by Mail:
      Step 1: Click “Get My Tax Record”
      Step 2: Click on “Get Transcript by Mail”.
      Step 3: Enter the required information as it is appears on your tax return using the information for the primary taxpayer.
      Step 4: Choose Return Transcript under Type of Transcript for the 2017 Tax Year.
      Step 5: The tax return transcript will be mailed to the address on your tax returns in 5-10 business days.
         **Please keep your original and provide us with a copy**
   b. Get Transcript Online (this is only available for those who have an account on the IRS online system):
      Step 1: Click “Get My Tax Record”
      Step 2: Click on “Get Transcript Online”.
      Step 3: Log-in as a returning user.
      Step 4: After logging in, choose “Higher Education/Student Aid” as the reason for your request. Click “Go”.
      Step 5: In the RETURN TRANSCRIPT section, click 2017. An asterisk beside 2017 means you have filed but the return has not been processed. You will need to try again later.
      Step 6: A PDF of your Tax Return Transcript will immediately appear on your screen. Print two copies, send one to us and retain one for your records. You may also wish to save this file on your computer.

3. Using form 4506-T
   a. Request by mail
      Step 1: Go to www.irs.gov.
      Step 2: Click “Get My Tax Record”
      Step 3: On the right hand side, click on “About Form 4506-T”.
      Step 4: Click “Form 4506-T”
      Step 5: Complete the form 4506-T, selecting box 6a.
      Step 6: Print, sign, and mail or fax the form to the address listed on the back of the form.
      Step 7: Upon receipt of the tax return transcript, please submit to the Wofford Financial Aid Office.

Instructions for requesting IRS Verification of Non-Filing

If you have NOT completed a 2017 tax return and do not plan to do so, we must collect a Verification of Non-Filing provided by the IRS. Please request this form using the following instructions:

1. Request by mail
   Step 1: Go to www.irs.gov.
   Step 2: Click “Get My Tax Record”
   Step 3: On the right hand side, click on “About Form 4506-T”.
   Step 4: Click “Form 4506-T”
   Step 5: Complete the form 4506-T, selecting box 7.
   Step 6: Print, sign, and mail or fax the form to the address listed on the back of the form.
   Step 7: Upon receipt of the Verification of Non-Filing, please submit to the Wofford Financial Aid Office

*If you need further assistance requesting the information from the IRS website, please contact them by phone at 1-800-908-9946*