W
WOFFORD

OFFICE OF FINANCIAL AID
2024-25 DEPENDENT AGGREGATE VERIFICATION WORKSHEET (V5)

- · Your 2024-25 Free Application for Federal Student Aid (FAFSA) was selected for a process called verification by the Department of Education.
- · Please complete this verification worksheet accurately, review the following instructions carefully and provide all required documentation.
- · If any of the information provided below differs from information reported on your 2024-25 FAFSA, the Office of Financial Aid will make the necessary corrections.
- · The results of the verification process will be reported on your financial aid award offer.
- · **We will not be able to award you federal, state or need-based institutional financial aid until you have provided all the information requested.**

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

STEP 1: STUDENT INFORMATION

STUDENT FULL NAME (PLEASE PRINT)	W _____ WOFFORD ID NUMBER	XXX-XX-_ _ _ _ SOCIAL SECURITY NUMBER

STEP 2: FAMILY SIZE INFORMATION
(USE ADDITIONAL PAPER IF NECESSARY)

In the chart on page 2, include the following:

· The student.

· The student's parents (and spouse or partner), even if the student is not living with them. Exclude a parent who has died or is not living in the household because of separation or divorce. Include a parent who is on active duty in the U.S. Armed Forces apart from the family.

· The student's siblings if the following are true:
  · They live with the student's parents (or live apart because of college enrollment),
  · They receive more than half their support from the student's parents, and
  · They will continue to receive more than half their support from the student's parents during the award year (July 1, 2024-June 30, 2025).

· Other persons if the following are true:
  · They live with the student's parents
  · They receive more than half their support from the student's parents ,and
  · They will continue to receive more than half their support from the student's parents during the award year (July 1, 2024-June 30, 2025).

The provided criteria for "dependent children" or "other persons" align with the requirement that family size align with whom the parent could claim as a dependent on a U.S. tax return if the parent were to file a U.S. tax return at the time of completing the 2024-25 FAFSA. As a result, the parent should not include any unborn children in the family size.

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

FULL NAME OF FAMILY MEMBER (AS OUTLINED ABOVE)	AGE	RELATIONSHIP TO STUDENT
		self

STEP 3: TAX FILING STATUS
(COMPLETE BOTH STUDENT AND PARENT SECTIONS)

STUDENT

Did the student file taxes for 2022?

_____ YES: The student filed taxes (student tax data must be submitted by one of the methods on page 6).

_____ NO: The student worked but did not file taxes (student must complete the chart below and submit 2022 W-2's).

_____ NO: The student did not work nor file taxes in 2022.

PARENT

Did one or both parents listed on the previous page file a 2022 tax return?   _____ YES _____ NO

If YES, follow the instructions on page 6 to submit your tax data.

If NO, please complete the chart below **AND** submit all 2022 W-2s received. Contact the Office of Financial Aid for further instructions on how to obtain a Non-Filing Verification Letter.

Please complete this chart if you worked and did NOT file taxes.

NAME OF STUDENT / PARENT	EMPLOYER'S NAME (N/A IF NOT EMPLOYED)	2022 IRS W-2 RECEIVED? (YES OR NO)	2022 AMOUNT EARNED

STEP 4:
IDENTITY AND 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.

B. The original Statement of Educational Purpose on page 4, 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.**

STUDENT'S NAME _____ WOFFORD ID: _____

Statement of Educational Purpose
(to be signed at the institution or with a notary)

I certify that I _____ am the individual signing this Statement of Educational
PRINT STUDENT'S NAME

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 College for 2024-25.

_____   _____   _____
STUDENT'S SIGNATURE   DATE   STUDENT'S ID #

Notary's Certificate of Acknowledgement

State of _____

City/County of _____

On _____, before me, _____
DATE   NOTARY'S NAME, PRINTED

personally appeared, _____, and proved to me on the
PRINTED NAME OF SIGNER

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   _____
NOTARY SIGNATURE

My commission expires on _____.
DATE

·········· OFFICE USE ONLY FOR STATEMENT OF IDENTIFICATION ··········

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 5: CERTIFICATION

By signing this worksheet, we certify that all of the information reported on this form is true, complete and correct, and give permission to Wofford College to make applicable changes to my FAFSA. Electronic signatures are not acceptable.

STUDENT'S SIGNATURE (ELECTRONIC SIGNATURES NOT ACCEPTABLE)

DATE

PARENT SIGNATURE (ELECTRONIC SIGNATURES NOT ACCEPTABLE)

DATE

. . . .

**We cannot accept emailed or faxed documents because of privacy and security concerns.
Please use one of the following methods to submit your documentation.**

MAIL
Office of Financial Aid
Wofford College
429 N. Church Street
Spartanburg, S.C. 29303

IN PERSON
Hugh S. Black Admin Bldg.
2nd floor above Admission

INSTRUCTIONS FOR PROVIDING 2022 TAX DATA

To be eligible for financial assistance, you and your parents (and spouse or partner) must consent to the direct data exchange (FA-DDX) between the Department of Education and the Internal Revenue Services (IRS) to import most U.S. income and tax information to the FAFSA form. In certain circumstances, the data may not be able to import to the FAFSA form and you will need to submit the 2022 tax information for verification. Below are options for doing so:

1. **Submit a SIGNED copy of your 2022 tax return submitted to the IRS (including Schedules 1-3 and Schedule C, if applicable).**

2. **Directly from the IRS online at www.IRS.gov.**

   GET TRANSCRIPT BY MAIL:

   Step 1: Click "Get Your Tax Record."

   Step 2: Click on "Get Transcript by Mail."

   Step 3: Enter the required information as it appears on your tax return using the information for the primary taxpayer.

   Step 4: Choose "Return Transcript" under Type of Transcript for the 2022 tax year.

   Step 5: The tax return transcript will be mailed to the address on your tax return in 5-10 business days. Please keep your original and provide us with a copy.

4. **Directly from ID.me** (Return Transcript, Record of Account Transcript, Account Transcript, Wage & Income Transcript).

   Step 1: Open ID.me in your browser.

   Step 2: Click "Learn More" in Internal Revenue Service block.

   Step 3: Click "Connect with ID.me" in Internal Revenue Service block.

   Step 4: Click "Sign in to Your Account" and then again on the next page. **Jump to step 10** if you have an existing account.

   Step 5: Click "Create an account" to create account if you **do not** have an existing account.

   Step 6: Enter your email, create and confirm a password. You will get an email confirming the email address.

   Step 7: Choose a multi-factor (MFA) option. You will get a six digit code sent to the MFA option you entered (ie. a text to your cell).

   Step 8: Generate a Recovery Code and record in a secure location.

   Step 9: Choose how you verify your identity*:

   - Self Service (fastest option, requires one identity document passport, DL, state ID and a selfie).
   - Video Chat Agent (must have two identity documents available)
   - * Follow instructions carefully. Have identity documents ready. You will be asked to share personally identifiable information such as SSN.

   Step 10: After you have created your account or logged into an existing account, a screen will pop up showing the dashboard for your account.

   Step 11: Click View Tax Records in the Records block.

   Step 12: On the Tax Records page, click Get Transcript. Select Higher Education/Student Aid for the reason for transcript. Choose 2021 for tax year under the transcript requested by our office. The transcript will be displayed on the screen and can be printed or downloaded to your computer.