



## Independent Aggregate Verification Worksheet

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) has been selected for a process called verification. Please submit this form with all required documentation to the Financial Aid Office. Southwestern University will confirm that the information reported on your 2023-2024 FAFSA is accurate. Any discrepancies will be corrected by the Financial Aid Office based on the information provided on this document. More information about Verification may be found on our [Verification FAQ's Page](#).

### A. Student Information (please print)

_____	_____	_____
Last Name	First Name, Middle Initial	SU ID#
_____	_____	_____
Street Address	City, State, Zip	Home/Cell Number (area code)

### B. Family Information (please print)

List the people in your parents' household including:

- Yourself (student)
- Your spouse
- Your child(ren), even if they don't live with you, ONLY IF (a) you will provide more than half of their support from 7/1/2023 through 6/30/2024, or (b) the child(ren) would be required to provide your information when applying for Federal Student Aid during the 2023-24 academic year.
- Other people ONLY IF (a) they live with you, (b) you provide more than half of their support, AND (c) you will continue to provide more than half of their support from 7/1/2023 through 6/30/2024.
- In addition, including the name of the college, for any household member who will be attending college at least half-time in a degree, diploma or certificate program between 7/1/2023 and 6/30/2024.

If you need more space, attach a separate sheet.

FULL NAME	AGE	RELATIONSHIP TO STUDENT	COLLEGE
		Me (Student)	Southwestern University
		Spouse (If Applicable)	



### C. Student Tax Forms & Income

Did you (student) file a 2021 U.S. Federal Tax Return? Please check one box below. If none, list "0" or "NA"

- Yes**, I used the IRS Data Retrieval Tool to directly import my income information into the FAFSA.
- Yes**, but I did not use the IRS Data Retrieval Tool. **Attached is my signed copy of the 2021 Tax Return and applicable schedules that were filed. (The 2021 Tax Return Transcript from the IRS is also acceptable).**
- No**, I am not filing and I am not required to file a US Tax Return. **List your employer(s) and income received in 2021 below, and attach your W2(s)**

Employer / Source of Income <i>(if none, list n/a)</i>	2021 Income <i>(if none, list \$0)</i>
	\$
	\$

### D. Spouse Tax Forms & Income

Did you (spouse) file a 2021 U.S. Federal Tax Return? Please check one box below. If none, list "0" or "NA"

- Yes**, I used the IRS Data Retrieval Tool to directly import my income information into the FAFSA.
- Yes**, but I did not use the IRS Data Retrieval Tool. **Attached is my signed copy of the 2021 Tax Return and applicable schedules that were filed. (The 2021 Tax Return Transcript from the IRS is also acceptable).**
- No**, I am not filing and I am not required to file a US Tax Return. **List your employer(s) and income received in 2021 below, and attach your W2(s)**

Employer / Source of Income <i>(if none, list n/a)</i>	2021 Income <i>(if none, list \$0)</i>
	\$
	\$

### E. High School Completion

Per federal regulations, Southwestern University must receive documentation confirming your high school diploma, recognized equivalent, or homeschool credential. NOTE: The documentation must be submitted to the Financial Aid Office, even if previously provided to another Southwestern University department/office (such as the Admission Office).

Please check the box that best describes the documentation you will be submitted with this completed worksheet.

- Copy of the student's high school diploma or final high school transcript showing the date the applicant completed secondary school

OR

- Copy of a recognized equivalent to a student's high school diploma

- General Education Development Certificate
- Certificate recognized by the state as an equivalent to a diploma
- Academic transcript showing successful completion of at least a two-year program – fully acceptable toward a Bachelor's Degree

OR

- Copy of homeschool documentation

- Transcript signed by student's parent/guardian certifying completion of secondary education and courses completed by student
- State-issued home school certification credential



## F. Identity Verification & Statement of Educational Purpose

As a part of the verification process, you must appear in person, at the Financial Aid Office with the following:

- Valid government-issued photo identification (ID), such as a driver's license, state-issued ID, or passport
- You must sign this form in the presence of a Financial Aid official.

**NOTE: Our office will retain a copy of the student's photo ID, annotated with date received and reviewed, with the name of the official authorized to receive and review the student's ID.**

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

- A copy of the unexpired valid-government issued ID, that is acknowledged in the notary statement, or presented to a notary.
- The original Statement of Educational Purpose, which must be notarized (below)

### Statement of Educational Purpose

I certify that I \_\_\_\_\_ am the individual signing this Statement of Educational Purpose  
(Print Student's Name)

and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Southwestern University for 2023-2024.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student's ID Number

### Notary's Certificate of Acknowledgement

(Only complete this section if you cannot appear in person)

State of \_\_\_\_\_ City/County of \_\_\_\_\_ On \_\_\_\_\_,

before me, \_\_\_\_\_, personally appeared, \_\_\_\_\_  
(Notary's name) (Printed name of signer)

provided to me on basis of satisfactory evidence of identification \_\_\_\_\_  
(Type of government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

\_\_\_\_\_  
(Notary signature)

WITNESS my hand and official seal  
(seal)

My commission expires on \_\_\_\_\_  
Date



# SOUTHWESTERN UNIVERSITY

2023-2024 Independent Aggregate  
Verification Worksheet  
Financial Aid Office  
PO Box 770  
Georgetown, TX 78627  
Phone: (512) 863-1259  
Fax: (512) 863-1507

## G. Certification

By signing this worksheet, we certify that all the information reported is complete and correct.

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

**NOTE:** You must print and sign this portion of the form.

\_\_\_\_\_  
Student Signature (REQUIRED)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature (IF MARRIED)

\_\_\_\_\_  
Date

\_\_\_\_\_  
SU Financial Aid Staff Member's Signature  
*(Only if witnessing in-person signatures of student and spouse)*

\_\_\_\_\_  
Date

\_\_\_\_\_  
SU Financial Aid Staff Member's Name & Title  
*(If signed above, must also copy original ID's)*