

I. Student Information

Name: _____

NKU ID/SSN: _____ Date of Birth: _____

Address: _____ City: _____

State: _____ Zip: _____ Phone No.: _____

II. Household Information

Check one:

Dependent Students

List below the people in the **parent's household** including:

- The student/Yourself
- The parents (including step-parent) even if the student doesn't live with the parents.
- The parents' other dependent children*
- Other people**

Independent Students:

List the people in **student's household** including:

- The student/Yourself
- Your spouse, if married
- Your children*
- Other people**

*The student/parents can claim these people in the household if the student/parent will provide more than half of the children's support from July 1, 2023 through **June 30, 2024**, or if the other children would be required to provide parental information if they were completing a FAFSA for 2023-2024.

If they now live with the student/parents and the student/parents provide more than half of the other people's support and will continue to provide more than half of their support through **June 30, 2024.

To complete the verification process, all fields below are required for each member of the household. If more space is needed, provide a separate page with the student's name and Student ID number at the top and attach it to this worksheet.

- **Note:** If you are listing an unborn child in the household, please provide the child's expected due date (MM/DD/YYYY).

Full Name	Age	Relationship to Student	College Attending 2023-2024***	Will be Enrolled at Least Half Time?
Student Name:		Self	NKU	Yes

***Will be attending at least half-time between July 1, 2023 and June 30, 2024 and enrolled in a degree, diploma, or certificate program at an eligible postsecondary educational institution. **Parent(s) are not included in number in college.**

III. Statement of Educational Purpose

For this section, the student **MUST** appear in person at Northern Kentucky University Office of Student Financial Assistance 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.

I certify that I, _____, am the individual signing this *Statement of Educational Purpose* and that the federal student
(Print Student's Name)

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

STUDENT SIGNATURE: _____ Date _____

FINANCIAL AID ADMINISTRATOR: _____ Date _____
(Financial Aid Administrators, please attach a dated copy of the student's government-issued photo identification.)

Instructions for Section IV (Parent Tax Information) and Section V (Student Tax Information):**Tax Filers:**

We are required to verify information listed on the **2021** IRS Federal Tax Transcript. You may choose **one** of the two options listed below to provide your income tax information:

- 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.** In most cases, no further documentation is needed to verify **2021** IRS income tax return information. Go to www.fafsa.gov, login to your FAFSA record. Select "Make FAFSA Corrections" and go to the Financial Information tab to elect to use the IRS DRT and resubmit your FAFSA once complete.
 - To obtain a paper copy of your **2021** IRS Tax Return Transcript, go to www.irs.gov/transcript and click on the "Get Transcript by MAIL" or "Get Transcript ONLINE" button. Be sure to request the "**Tax Return Transcript**".
- An individual who is required to file a **2021** IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year **2021**, must provide: A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year **2021**, a verification of non-filing letter from the IRS dated on or after October 1, 2021, a copy of IRS Form W-2 for each source of employment income received for tax year **2021** 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 year **2021**.
 - If the earnings reported on the FAFSA differ from the wages listed on the tax return transcript, you will be required to provide W-2 forms in order to verify income. If you have used the DRT, W-2 forms may not be required.

Non-Tax Filers:

Non-tax filers **must provide** a confirmation of non-filing from the IRS dated on or after October 1, 2021. A confirmation of non-filing can be obtained from www.irs.gov/transcript and click on "Get Transcript ONLINE" or by mailing in Form 4506-T and checking box 7.

- Dependent students are **NOT** required to provide a confirmation of non-filing from the IRS if they did not file in 2021.

IV. Parent Tax Information (for dependent students)

Tax Filers: Complete this section **ONLY** if the parents **filed or will file** a **2021** IRS income tax return(s).

Check the box that applies:

- The parents have used the IRS DRT in FAFSA on the Web to transfer **2021** IRS income tax return information into the the student's FAFSA.**
- The parents have not yet used the IRS DRT in FAFSA on the Web, but will use the IRS DRT to transfer **2021** IRS income tax return information into the student's FAFSA.
- The parents are unable* or choose not to use the IRS DRT in FAFSA on the Web, and instead will provide the school with a **2021** IRS Tax Return Transcript(s) from www.irs.gov/transcript.

* If the parents filed separate **2021** IRS income tax returns, the IRS DRT cannot be used and the **2021** IRS Tax Return Transcript(s) must be provided for each parent.

** If the parents filed an Amended IRS Income Tax Return for tax year **2021**, you must provide a **2021** IRS Tax Return Transcript and a signed copy of the **2021** IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Non-Tax Filers: Complete this section **ONLY** if the parents will not file and are not required to file a **2021** income tax return with the IRS.

Check the box that applies:

- Neither parent was employed, and neither had income earned from work in **2021**.
- One or both parents were employed in **2021** and have listed below the names of all employers, the amount earned from each employer in **2021**, and whether an IRS W-2 form is provided. [Provide copies of all **2021** IRS W-2 forms issued to the parents by their employers]. 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 provided to NKU? (circle one)	Annual Amount Earned in 2021
	YES-enclosed NO-but will provide	
	YES-enclosed NO-but will provide	

V. Student Tax Information

Tax Filers: Complete this section ONLY if the student (and spouse, if the student is married) filed or will file a **2021** IRS income tax return(s).

Check the box that applies:

- The student has used the IRS DRT in FAFSA on the Web to transfer **2021** IRS income tax return information into their FAFSA.**
- The student has not yet used the IRS DRT in FAFSA on the Web, but will use the IRS DRT to transfer **2021** IRS income tax return information into their FAFSA.
- The student is unable* or chooses not to use the IRS DRT in FAFSA on the Web, and instead will provide the school with a **2021** IRS Tax Return Transcript(s) from www.IRS.gov/transcript.

* If the student and student's spouse filed separate **2021** IRS income tax returns, the IRS DRT cannot be used and the **2021** IRS Tax Return Transcript(s) must be provided for both the student and the student's spouse.

** If the student and/or spouse filed an Amended IRS Income Tax Return for tax year **2021**, you must provide a **2021** IRS Tax Return Transcript and a signed copy of the **2021** IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Non-Tax Filers: Complete this section ONLY if the student (and spouse, if the student is married) will not file and are not required to file a **2021** income tax return with the IRS.

Check the box that applies:

- The student and/or spouse were not employed, and had no income earned from work in **2021**.
- The student and/or spouse were employed in **2021** and have listed below the names of all employers, the amount earned from each employer in **2021**, and whether an IRS W-2 form is provided. [Provide copies of all **2021** IRS W-2 forms issued to the student and/or spouse by their employers]. 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 provided to NKU? (circle one)	Annual Amount Earned in 2021
	YES-enclosed NO-but will provide	
	YES-enclosed NO-but will provide	

VI. Sign this Worksheet

The Law states your school must review the requested information under the financial aid program rules (*CFR Title 34, Part 668*) and make corrections if necessary. If we have reason to believe the information provided is inaccurate or needs further explanation, we may ask for additional documentation. By signing this worksheet I/we certify that all of the information reported to qualify for federal student aid is complete and correct. The parent must also sign if the student is dependent. **WARNING: If you purposefully give misleading or false information you may be fined, sentenced to jail, or both.**

STUDENT: _____ DATE: _____

PARENT: _____ DATE: _____
(for dependent students)