



Student's Name: \_\_\_\_\_ YUID: \_\_\_\_\_

**Instructions:**

- Online Request - Go to [www.irs.gov](http://www.irs.gov), under the Tools heading on the IRS homepage; click "Get a Tax Transcript by Mail." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Telephone Request - 1-800-908-9946
- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T

If you filed electronically then you may request a transcript 2-3 weeks after filing – paper filers must wait 8-11 weeks.

**NOTE: We cannot accept a signed copy of the tax return**

**D. Dependent Student's Income Information to Be Verified :**

Check the box that applies if you filed or will file a 2017 IRS income tax return:

- You have used the IRS Data Retrieval Tool (DRT) in FAFSA on the Web to transfer 2017 IRS income tax return information into your FAFSA.
- You have not yet used the IRS DRT in FAFSA on the Web, but will use the tool to transfer 2017 IRS income tax return information into your FAFSA once the 2017 IRS income tax return has been filed.
- You are unable or choose not to use the IRS DRT in FAFSA on the Web, and instead will provide the school a 2017 IRS Tax Return Transcript.
- You will not file a 2017 IRS income tax return, complete the table below and attach copies of ALL 2017 W-2 forms and continue to section E.

Employer's Name	2017 Amount Earned
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>

**E. Parent's Income Information to Be Verified— Note:** The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2017 or had a change in marital status after the end of the 2017 tax year on December 31, 2017.

- The parents have used the IRS DRT in FAFSA to transfer 2017 IRS income tax return information into the student's FAFSA.
- The parents have not yet used the IRS DRT in FAFSA, but will use the tool to transfer 2017 IRS income tax return information into the student's FAFSA once the 2017 IRS income tax return has been filed.
- The parents are unable or choose not to use the IRS DRT in FAFSA, and instead will provide the school a **2017 IRS Tax Return Transcript(s)**. (signature not required)
- Your parents will not file a 2017 IRS income tax return, complete the table below and attach copies of ALL 2017 W-2 forms and continue to section F.

Source of Income - Employer's Name only	2017 Amount Earned
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>



Student's Name: \_\_\_\_\_ YUID: \_\_\_\_\_

**I1. Identity and Statement of Educational Purpose (To Be Signed With Notary)**

If you are unable to appear in person at Yeshiva University, Office of Student Finance to verify your identity, you must provide:

- (a) A copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a driver's license, other state-issued ID, or passport; and
- (b) The original notarized Statement of Educational Purpose provided below.

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing 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 Yeshiva University for 2019–2020.

\_\_\_\_\_  
(Student's Signature) (Date) Student's ID Number

**Notary's Certificate of Acknowledgement**

State of \_\_\_\_\_

City/County of \_\_\_\_\_

On \_\_\_\_\_, before me, \_\_\_\_\_, personally appeared  
(Date) (Notary's name)

\_\_\_\_\_, and provided to me on basis of satisfactory evidence of identification  
(Printed name of signer)

\_\_\_\_\_ to be the above-named person who signed the foregoing instrument.  
(Type of government-issued photo ID provided)

**WITNESS my hand and official seal**

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

My commission expires on \_\_\_\_\_  
(Date)

**J. Certification and Signatures:**

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

\_\_\_\_\_  
Student's Signature Student Name (Please Print) \_\_\_\_\_ / /  
Date

\_\_\_\_\_  
Parent's Signature Parent (Please Print) \_\_\_\_\_ / /  
Date

Forms must be submitted to  
Yeshiva University, Office of Student Finance  
500 West 185th Street, New York, New York, 10033 or Fax 212- 960-0037  
Please note: all forms and documents must be signed by all parties.  
You should make a copy of this worksheet for your records.

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



# Yeshiva University Office of Student Aid

500 West 185th Street | New York, New York 10033-3201 | Phone 212 960 5399 | Fax 212 960 0037 | Email studentaid@yu.edu

## 2019-2020 Asset Verification Form

Student's Name \_\_\_\_\_ YU ID# \_\_\_\_\_  
Last First M.I.

The following asset information is needed in order to complete the verification process. The figures provided below should reflect values as reported on the date the Free Application for Federal Student Aid (FAFSA) was filed. Please read this form carefully and answer all the questions that apply—do not leave any questions blank, use a zero.

**A. SAVINGS:** Please report the total value of all savings and checking accounts. The figures provided below will be compared with what you reported on your 2017 tax return, line 8a of the 1040/1040A or line 2 of the 1040EZ. We will divide the interest income by .01 (1%) if the interest income amount is < \$250 and by .2 (2%) if it is greater than > \$250.

**PARENT(S):** Checking: \_\_\_\_\_ **STUDENT/SPOUSE:** Checking: \_\_\_\_\_  
 Savings: \_\_\_\_\_ Savings: \_\_\_\_\_

**B. REAL ESTATE:** If line 17 of your 2017 tax return lists income or loss from rental real estate\*, you must complete the following formula:

<b>PARENT(S):</b> Value of property \$ _____	<b>STUDENT/SPOUSE:</b> Value of property \$ _____
Percentage owned _____	Percentage owned _____
Minus remaining mortgage owed - _____	Minus remaining mortgage owed - _____
Estimated current net worth = \$ _____	Estimated current net worth = \$ _____

\*Important note: Do not include your family's primary place of residence in property values. You must only include any part of your home that you rent to someone else. For example, if half of the house is rented, use 50% of the current market value minus 50% of the mortgage owed to calculate the net worth. If the amount on line 17 of your 2017 federal tax return is the result of a partnership, trust, or S corporation, please explain the arrangement on the back of this form and include the net worth in Section C below.

**C. INVESTMENTS:** If line(s) 9, 10 (1040A) and/or 13, 14 (1040) of your tax return show any dividend income or capital gain, you must report the total net worth of any of your current (unsold) investments. That figure is the total current net worth of your stocks, bonds, and mutual funds, etc. Also include the net worth of any partnerships and/or S corporations and all associated assets. (Do not include savings, real estate, retirement plans or business assets.)

**PARENT(S):** Current net worth of investments: \$ \_\_\_\_\_ (Net worth = Total current market value less associated debt. If the net worth is negative, report a zero.)

Check here if you had income from an investment in 2017 but have since sold it; explain how the proceeds were used on the back of this form.

**STUDENT/SPOUSE:** Current net worth of investments: \$ \_\_\_\_\_ (Net worth = Total current market value less associated debt. If the net worth is negative, report a zero.)

Check here if you had income from an investment in 2017 but have since sold it; explain how the proceeds were used on the back of this form.

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**D. BUSINESS:** If line 12 of your tax return shows income (or loss) from a business, and if you have **100** or more employees, you must report the net worth of your business. (Net worth = Total value of land, buildings, machinery, equipment, and inventory less debt. Business debt is only defined as debt for which the business itself was used as collateral.)

Please check and complete one of the following two options:

1. Business income reported on your 2017 tax return reflects profits/losses from the operation of a business with 100 or more employees.

Type of Business \_\_\_\_\_

Total Business Net Worth \$ \_\_\_\_\_ (This will *not* be the same amount reported on line 12 of your tax return.)

2. Business income reported on the 2017 tax return reflects self-employment/freelance earnings with no associated assets, and zero net worth.

Describe nature of work \_\_\_\_\_

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**E. ADDITIONAL INFORMATION:** Please use the space provided to explain the arrangements of your partnership, trust, or S corporation that generated income or loss from rental real estate.

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Please use the space provided to explain the sale of any investment that generated income in 2017 but has since been sold. Be sure to include how the proceeds from that sale were used.

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**F. SIGNATURE:** I hereby confirm that the information herein is true and complete:

\_\_\_\_\_  
Parent

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student

\_\_\_\_\_  
Date

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