



## Yeshiva University – Office of Student Aid

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### 2026-2027 Independent Verification Worksheet V5(Aggregate)

#### Student's Information

Student's Last Name Student's First Name Student's M.I.      Student's YU ID Number

Student's Street Address (include apt. no.)      City      State Zip Code

Student's Cell Phone Number      Student's Email Address

#### ***List the people in your household, including:***

- Yourself
- The student's spouse if student is married.
- Anyone that lives in your and your spouse's household (including your children even if they are living away at college) for whom you will provide more than half of their support from July 1, 2026, through June 30, 2027. • Be sure to include the Name, Age, and Relationship or the worksheet will be considered incomplete.

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

| Full Name | Age | Relationship |
|-----------|-----|--------------|
|           |     | Self         |
|           |     |              |
|           |     |              |
|           |     |              |

#### ***Independent Student's Income Information to Be Verified (Check the box that applies.)***

The student and or spouse have consented to use the Direct Data Exchange (DDX) on the FAFSA to retrieve and transfer 2024 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA OR will provide the institution with a 2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return and applicable schedules.

The student and or spouse were not employed and had no income earned from work in 2024 OR the student and or spouse employed but were not required to file a 2024 federal tax return.

List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and YUID# number at the top.

| Employer's Name                         | IRS W-2 or an Equivalent Document Provided? | Annual Amount Earned in 2024 |
|---|---|------------------------------|
| (Example) ABC's Auto Body Shop          | Yes   | \$4,500.00                   |
|   |   |                              |
|   |   |                              |
| Total Amount of Income Earned From Work |   | \$                           |

Provide a signed and dated statement certifying that the individual has not filed and is not required to file a 2024 income tax return, as well as the sources of 2024 income earned from work and the amount of income from each source.

Check here if non-filing statement is signed and dated.

#### **Verification of Identity**

Check the box that applies below:

The student appeared in person and presented acceptable identification to an institutionally authorized individual.

The student was unable to appear in-person and provided the institution with a copy of the acceptable identification presented to a notary and a signed notary statement.

The student was unable to appear in-person and appeared on a video call with institutional personnel and presented the acceptable identification to an institutionally authorized individual.

## Identity and Statement of Educational Purpose (To Be Signed at the Institution)

The student must appear in person at [Yeshiva University, Office of Student Finance](#) to verify his or her identity by presenting 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 following:

## 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 2026-2027.

|   |       |              |
|---|-------|--------------|
| Student's Signature                                 | Date  | YU ID Number |
| <b>Office use Only : Witnessed by:</b>              |       |              |
| Print Name of the Student Aid Office representative | Title |              |
| Signature of the Aid Office representative          | Date  |              |

## 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 2026-2027.

|  |                           |                        |
|--|---------------------------|------------------------|
| Student's Signature  | Date                      | Student's YU ID Number |
| <b>Notary's Certificate of Acknowledgement</b>   |                           |                        |
| 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 _____  |                           |                        |
| <b>WITNESS my hand and official seal</b>   |                           |                        |
| (seal)   | _____<br>Notary signature |                        |
| My commission expires on _____   |                           |                        |
| Date _____   |                           |                        |

## 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 |
| Spouse's Signature  | Spouse (Please Print)       | Date |

## All completed worksheets must be mailed or brought in to the address indicated below:

Yeshiva University – Office of Student Aid

2495 Amsterdam Ave room 1013A, NEW YORK, NY 10033-3201

Phone: 646 592 6250

### Instructions:

As part of federal student aid eligibility, students, and or spouse as appropriate, will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the spouse filed separate 2024 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2024 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

If 2024 income tax return information for the student and or spouse, (if applicable) were not available or could not be used, the student and or spouse should provide the institution with a 2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return and applicable schedules.

A 2024 IRS Tax Return Transcript may be obtained through:

Get Transcript by Mail – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and *NOT* the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.

Get Transcript Online – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and *NOT* the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.

Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

### Verification and Various IRS Issues

#### Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2024 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2024, must provide:

- A signed statement listing the sources of any 2024 income and the amount of income from each source;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2024;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2024; 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 tax year 2024.

#### Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2024 must provide a signed copy of the 2024 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
- A **2024 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2024 IRS Form 1040 and the applicable schedules that were filed with the IRS.

#### Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS or, if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2024 income tax return and applicable schedules the individual filed with the IRS; **and**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax- related identity theft and that the IRS is aware of the tax-related identity theft.

#### Individuals Who Filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.