LMU | Lincoln Memorial University
HARROGATE, TENNESSEE

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# 2027-2028 V1 Independent Verification Worksheet

**What is Verification?** – The Department of Education randomly selects a percentage of students for verification. Before awarding Federal Student Aid, we must collect documentation to verify the information reported on your FAFSA. We may correct your FAFSA based on your provided documentation if there are discrepancies. During the verification process, it may be determined that additional documents are needed.

**Instructions:** Read this worksheet thoroughly and answer all questions. Your LMU school ID number can be found in MyLMU > select the "Account" icon in the top right corner > "My Profile." Return the worksheet and all requested documentation to the Office of Student Financial Services as soon as possible to prevent financial aid processing delays.

As part of federal student aid eligibility, students and spouses (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 student and spouse filed separate 2025 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 2025 income information that was transferred into the student's FAFSA using the income and tax information directly from the IRS via the FA-DDX.**

**If 2025 income tax information for the student (or spouse, if applicable) was not transferred via the FA-DDX and considered verified, the student should provide the institution with a 2025 IRS Tax Return Transcript(s) or a signed copy of the 2025 income tax return and applicable schedules.**

A 2025 IRS Tax Return Transcript may be obtained through:

- Get Transcript by Mail – Go to https://www.irs.gov/individuals/get-transcript, 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 https://www.irs.gov/individuals/get-transcript, click "Sign in to your online account." Make sure to request the "Return Transcript" and NOT the "Account Transcript." Follow the instructions to create an ID.me account if you do not already have one. For help creating an ID.me account or verifying your identity, visit help.id.me.
- Automated Telephone Request – 1-800-908-9946. The 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.

Contact our office if you have filed an amended 2025 1040X federal income tax return, were granted an extension, and have not filed your 2025 return, or if you were the victim of identity theft.

## A. Student Information

| Student Name | Date of Birth | LMU School ID Number |
|---|---|---|
| | | |

| Address |
|---|
| |

| City | State | Zip | Phone (include area code) |
|---|---|---|---|
| | | | |

## B. Family Size

**Family size includes the following:**

- The student.
- The student's spouse, if applicable.
- The student's dependent children if all of the following are true:
  - They live with the student (even if they live apart temporarily, such as due to attending college);
  - They receive more than half of their support from the student; and
  - They will continue to receive more than half of their support from the student from July 1, 2027, through June 30, 2028.
- Other persons if the following are true:
  - They live with the student;
  - They receive more than half of their support from the student; and
  - They will continue to receive more than half of their support from the student from July 1, 2027, through June 30, 2028.

The provided criteria for "dependent children" or "other persons" mirror the requirement that family size align with those the student could claim as a dependent on a U.S. tax return if the student were to file a U.S. tax return at the time of completing the 2027-2028 FAFSA. As a result, the student should not include any unborn children in the family size.

Provide a separate page with the student's name and LMU School ID number at the top if additional space is needed.

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

## C. Student Tax Information

1. Did you (the student) file a 2025 Federal Tax Return?
   ☐ **YES.** While completing the FAFSA, if you consented and the FA-DDX pulled over your Federal Tax Information, no additional tax documents are needed. If the FA-DDX transfer was ineffective, you must submit a 2025 IRS Tax Return Transcript OR a signed copy of your 2025 Federal Tax Return along with ALL applicable schedules. ***(Skip to section D.)***
   ☐ **NO**. I did not, will not, and was not required to file a 2025 income tax return with the IRS. ***(Must answer question 2 and sign.)***

2. **TAX RETURN NON-FILERS ONLY** – **By completing this section, I (the student), certify that I will not file and was not required to file a 2025 income tax return and that all my income earned from work, other income, and resources for the 2025 tax year are listed below.** Check all boxes that apply:
   ☐ I was not employed and had no income earned from work in 2025.
   ☐ I was employed in 2025. Please complete the table below and attach copies of all W-2s. List every employer, even if the employer did not issue a W-2 form. (Attach another sheet if additional space is needed.)
   ☐ I had other sources of income. Please complete the table below and list the sources and amounts of earnings, other income, and resources that were used to support you in 2025. (Attach another sheet if additional space is needed.)

| Employer(s) Name or Other Source of Income | 2025 Amount Earned | W-2 Attached? |
|---|---|---|
| | $ | |
| | $ | |
| | $ | |

**Signature of Student (only if tax return non-filer)**: _____ **Date:** _____

## D. Spouse Tax Information (if applicable)

**Spouse Name:** _____

1. Did the student's spouse file a 2025 Federal Tax Return?
   ☐ **YES.** While completing the FAFSA, if you consented and the FA-DDX pulled over your Federal Tax Information, no additional tax documents are needed. If the FA-DDX transfer was ineffective, you must submit a 2025 IRS Tax Return Transcript OR a signed copy of your 2025 Federal Tax Return along with ALL applicable schedules. ***(Skip to section E.)***
   ☐ **NO**. I did not, will not, and was not required to file a 2025 income tax return with the IRS. ***(Must answer question 2 and sign.)***

2. **TAX RETURN NON-FILERS ONLY** – **By completing this section, I (the spouse), certify that I will not file and was not required to file a 2025 income tax return and that all my income earned from work, other income, and resources for the 2025 tax year are listed below.** Check all boxes that apply:
   ☐ I (the spouse) was not employed and had no income earned from work in 2025.
   ☐ I (the spouse) was employed in 2025. Please complete the table below and attach copies of all W-2s. List every employer, even if the employer did not issue a W-2 form. (Attach another sheet if additional space is needed.)
   ☐ I (the spouse) had other sources of income. Please complete the table below and list the sources and amounts of earnings, other income, and resources that were used to support you in 2025. (Attach another sheet if additional space is needed.)

| Employer(s) Name or Other Source of Income | 2025 Amount Earned | W-2 Attached? |
|---|---|---|
| | $ | |
| | $ | |
| | $ | |

**Signature of Spouse (only if tax return non-filer)**: _____ **Date:** _____

## E. Certifying Signature

By signing below, I (the student) certify that all the information reported is complete and correct. I (the student) also understand that if any of the information reported on this form is inconsistent with what has been reported on the FAFSA, additional documentation may be required. **WARNING:** If you purposely give false or misleading information, you may be fined, sentenced to jail, or both.

_____ _____

**Student's Signature** (Use Legal Name) **Date**

**TO RETURN THIS FORM:**

**Mail to:** Lincoln Memorial University
Office of Student Financial Services
6965 Cumberland Gap Parkway
Harrogate, TN 37752

**In Person:** Office of Student Financial Services
DAR-Whitford Hall – Main Campus