

Your FAFSA was selected for review in a process called verification. This means UM Western will compare information from your FAFSA with the requested information as described in this worksheet. The law states “that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA.” If information does not match when comparing your documents to your FAFSA, corrections will be made to your FAFSA. (34 CFR, Part 668)

Please complete all sections of this form, sign and submit to the Financial Aid Office within 30 days.

(Do not leave any answers blank on the following sections)

SECTION A:

STUDENT INFORMATION

| | | | | |
|-----------------------|-------------------|------------|----------------------|----------------------|
| | | | | |
| <i>LAST NAME</i> | <i>FIRST NAME</i> | <i>MI</i> | <i>STUDENT ID#</i> | <i>DATE OF BIRTH</i> |
| | | | | |
| <i>STREET ADDRESS</i> | | | <i>EMAIL ADDRESS</i> | |
| | | | | |
| <i>CITY</i> | <i>STATE</i> | <i>ZIP</i> | <i>PHONE #</i> | <i>CELL #</i> |

SECTION B:

FAMILY INFORMATION

List below the individuals in the students' household. Include:

- The student
- The student's spouse (if the student is married)
- The student's or spouse's children, if the student or spouse will provide more than half of their support from July 1, 2023 through June 30, 2024.
- Other people if they now live with the student and the student or spouse provide **more than half** of their support and will **continue** to provide more than half of their support through June 30, 2024. **Be prepared to document the support.**

Write the names of all household members, including yourself, below. Then, for any household member who will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2023 and June 30, 2024. **(Include the name of the college)** If you need more space, attach a separate page and list the student's name and ID number at the top of the page.

| Full Name | Age | Relationship | During 2023-2024 will be enrolled @ least ½ time (6+ credits per semester)-Circle | Name of College |
|-----------------|-----|--------------|---|-------------------|
| <i>Student:</i> | | Self | No Yes ➡ | UM Western |
| | | | No Yes ➡ | |
| | | | No Yes ➡ | |
| | | | No Yes ➡ | |
| | | | No Yes ➡ | |
| | | | No Yes ➡ | |

Attach additional pages if necessary

SECTION C:**STUDENT'S TAX FORMS** *(Please check appropriate box.)*

- I transferred my tax data to FAFSA using IRS Data Retrieval and did not change the data.
- I am attaching my IRS Tax Return Transcript with **my Name & ID# on each page**.
- I am attaching a signed copy of my 2021 federal tax return and schedules 1, 2, and 3 (if filed).
- I _____ (student's signature) did not file *and am not required to file a 2021 U.S. Income Tax Return because:*
- ***I did not work***
 - **I have also enclosed a Non-Filing Letter which I requested from the IRS using the IRS form found at (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>).**
 - ***My 2021 earnings were less than the required amount to have to file. I have listed below each employer and the amount earned for 2021 & have attached the W-2 or 1099 for each.***
 - **I have also enclosed a Non-Filing Letter which I requested from the IRS using the IRS form found at (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>).**

| LIST STUDENT'S EMPLOYER/S SUBMIT A COPY OF W-2/1099 FORM FROM EACH EMPLOYER | STUDENT'S AMOUNT EARNED FROM YOUR 2021 W-2/1099 FORM | W-2/1099 ATTACHED? |
|--|---|-------------------------------|
| | | |
| | | |
| | | |
| | | |

If no W-2 or 1099 was issued, you must provide a written explanation as to why no W-2 or 1099 was provided and why you can't request a copy from the IRS or the employer.

SPOUSE'S TAX FORMS (Please check appropriate box.)

OR **NOT MARRIED** **SEPARATED** **DIVORCED**

- I transferred my tax data to FAFSA using IRS Data Retrieval and did not change the data.
- I am attaching my IRS Tax Return Transcript with **my Spouse's Name & ID# on each page**.
- I am attaching a signed copy of my 2021 federal tax return and schedules 1, 2, and 3 (if filed).
- I _____ (spouse's signature) did not file *and am not required to file a 2021 U.S. Income Tax Return because:*
- ***I did not work.***
 - **I have also enclosed a Non-Filing Letter which I requested from the IRS using the IRS form found at (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>).**
 - ***My 2021 earnings were less than the required amount to have to file. I have listed below each employer and the amount earned for 2021 & have attached the W-2 or 1099 for each.***
 - **I have also enclosed a Non-Filing Letter which I requested from the IRS using the IRS form found at (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>).**

| LIST SPOUSE'S EMPLOYER/S SUBMIT A COPY OF W-2/1099 FORM FROM EACH EMPLOYER | SPOUSE'S AMOUNT EARNED FROM THEIR 2021 W-2/1099 FORM | W-2/1099 ATTACHED? |
|---|---|-------------------------------|
| | | |
| | | |
| | | |
| | | |

If no W-2 or 1099 was issued, you must provide a written explanation as to why no W-2 or 1099 was provided and why you can't request a copy from the IRS or the employer.

Signing this form certifies that all the information reported is complete and correct.

Student Signature

Date

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

Identity and Statement of Educational Purpose

(To Be Signed in person at UMW Financial Aid Office)

The student must appear in person at UM Western 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 U.S. 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. (ID copy Attached) _____ Staff's Initials

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

Statement of Educational Purpose

I certify that I _____ am the individual signing
(Print Student's Name)

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 University of Montana Western for 2023-2024.

(Student's Signature)

(Date)

(Student's ID Number)

If you are unable to appear in person, please go to the UMW Financial Aid Website <https://www.umwestern.edu/wp-content/uploads/V4-Notary-Statement-of-Educational-Purpose-23-24.pdf> and complete the Notary Identity and Statement of Educational Purpose.

Please complete this form with the UM Western Financial Aid office within 30 days.