

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:

STUDENT’S TAX FORMS *(Please check appropriate box.)*

- I transferred my tax data directly from the IRS **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 2023 federal tax return and schedules 1, 2, and from 8863 (if filed).
- I _____ (student’s signature) did not file *and am not required to file a 2023 U.S. Income Tax Return* because:
 - **I did not work**
 - **My 2023 earnings were less than the required amount to have to file. I have listed below each employer and the amount earned for 2023 & have attached the W-2(s) or 1099 or other documentation of other resources used in support for the year. (Please complete the table below)**

LIST STUDENT’S EMPLOYER/S SUBMIT A COPY OF W-2/1099 FORM FROM EACH EMPLOYER	STUDENT’S AMOUNT EARNED FROM YOUR 2023 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 directly from the IRS **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 2023 federal tax return and schedules 1, 2, and form 8863 (if filed).
- I _____ (spouse's signature) did not file *and am not required to file a 2023 U.S. Income Tax Return because:*

- ***I did not work.***
- ***My 2023 earnings were less than the required amount to have to file. I have listed below each employer and the amount earned for 2023 & have attached the W-2(s) or 1099 or other documentation of other resources used in support for the year. (Please complete the table below)***

LIST SPOUSE'S EMPLOYER/S SUBMIT A COPY OF W-2/1099 FORM FROM EACH EMPLOYER	SPOUSE'S AMOUNT EARNED FROM THEIR 2023 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.

THE UNIVERSITY *of* MONTANA WESTERN

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 2025-2026.

(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-25-26.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.