



# WHITMAN COLLEGE™

## 2023-24 Dependent Verification Worksheet - V5

Student Name: \_\_\_\_\_ Whitman ID Number: \_\_\_\_\_

Student Date of Birth: \_\_\_\_\_ Phone: \_\_\_\_\_

Home Address: \_\_\_\_\_ City, State and Zip: \_\_\_\_\_

Your 2023-24 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law states that before awarding Federal Student Aid, we must ask you to confirm the information you reported on your FAFSA (34 CFR, Part 668). To verify that you provided correct information a financial aid administrator at Whitman will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit this form and other required documents to Financial Aid Services. Our office may ask for additional information. If you have questions about verification, contact Financial Aid Services as soon as possible so that your financial aid will not be delayed.

### FAMILY INFORMATION & HOUSEHOLD SIZE:

List the people in your parent's household below. Include the following:

- ☐ **Yourself and your parent(s)** (including stepparent) who provided information on your FAFSA.
- ☐ **Your parents' other children**, even if they don't live with your parent(s), if (a) your parent(s) will provide more than half of their support from **July 1, 2023, through June 30, 2024**, or (b) the children would be required to provide parental information when applying for federal student aid.
- ☐ **Other people** if they currently live with your parents and your parents provide more than half of their support and will continue to provide more than half of their support from **July 1, 2023, through June 30, 2024**.
- ☐ **Write the names of all household members.** Also write in the name of the college for any household member, **excluding your parent(s)**, who will be attending college **at least half-time between July 1, 2023, through June 30, 2024**, and who will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

List all family members full name:	Relationship:	Age:	College Name:
Chris Smith (example)	Self/Student	19	Whitman College (example)

### STUDENT'S INCOME & TAX INFORMATION: Check only ONE of the options below.

☐ I filed a 2021 federal income tax return and used the IRS Data Retrieval Tool on the 2023-24 FAFSA.

☐ I filed a 2021 US Federal tax return (1040) and have attached a copy of my Tax Return Transcript.

*To obtain an IRS tax return transcript go to [www.irs.gov](http://www.irs.gov) and click on the "Get Your Tax Record" link, or call 1-800-908-9946. Make sure you order the "IRS tax return transcript" and not the "IRS tax account transcript."*

☐ I filed an amended 2021 US Federal tax return and have attached a signed copy of my amended return (1040X) and a copy of my 2021 Tax Return Transcript (see above for instructions to request your Tax Return Transcript).

☐ I was not employed and did not earn income in 2021. I was not required to and did not file a 2021 federal income tax return.

☐ I was employed and earned income in 2021. I was not required to and did not file a 2021 federal income tax return.

- ☐ **Complete the chart below:** list all employers you worked for in 2021, as well as the amount you earned from each employer in 2021.
- ☐ **Attach copies of all 2021 W-2s to this worksheet.**

Employee Name:	Employer's Name	2021 Amount Earned	I have attached my W-2s

### PARENTS' INCOME & TAX INFORMATION: Check only ONE of the options below.

☐ I filed a 2021 federal income tax return and used the IRS Data Retrieval Tool on the 2023-24 FAFSA.

☐ I filed a 2021 US Federal tax return (1040) and have attached a copy of my Tax Return Transcript.

*To obtain an IRS tax return transcript go to [www.irs.gov](http://www.irs.gov) and click on the "Get Your Tax Record" link, or call 1-800-908-9946. Make sure you order the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address exactly on file with the IRS (normally this will be the exact address used when the 2021 IRS tax return was filed). It takes up to two to three weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers.*

☐ I filed an amended 2021 US Federal tax return and have attached a signed copy of my amended return (1040X) and a copy of my 2021 Tax Return Transcript (see above for instructions to request your Tax Return Transcript).

☐ I was not employed and did not earn income in 2021. I was not required to and did not file a 2021 federal income tax return. I have attached a copy of my Verification of Non-filing Letter from the IRS.

*To obtain a Verification of Non-filing Letter from the IRS, follow the instructions above for requesting a Tax Return Transcript, and, when prompted, select Verification of Non-filing Letter as the transcript type that you are requesting.*

☐ I was employed and earned income in 2021. I was not required to and did not file a 2021 federal income tax return.

- ☐ **Complete the chart below:** list all employers you worked for in 2021, as well as the amount you earned from each employer in 2021.
- ☐ **Attach copies of all 2021 W-2s to this worksheet, as well as a copy of your Verification of Non-filing Letter from the IRS.**

Employee Name:	Employer's Name	2021 Amount Earned	I have attached my W-2s

By signing this worksheet, we certify that all the information reported on this worksheet is complete and correct.

**At least one parent whose information was reported on the FAFSA must sign and date.**

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

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date

If you have any questions, we encourage you to contact Financial Aid Services at (509)527-5178 or e-mail our staff at [finaid@whitman.edu](mailto:finaid@whitman.edu).

**FORM CONTINUES ON NEXT PAGE**

### IDENTITY & STATEMENT OF EDUCATIONAL PURPOSE

You must appear in person or have the following statement notarized. Please check the box indicating your preference.

<input type="checkbox"/>	<b>IDENTITY &amp; STATEMENT OF EDUCATIONAL PURPOSE (TO BE SIGNED AT THE INSTITUTION)</b>
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The student must appear in person at Whitman College 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 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.

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 this  
*Print Student's Name*  
 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 Whitman College for 2023-24.

\_\_\_\_\_  
 Student's Signature

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Student's ID Number

#### FOR WHITMAN COLLEGE FINANCIAL AID OFFICE USE ONLY

\_\_\_\_\_  
 Signature of Staff Member that Collected form

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Form of ID

## ☐ IDENTITY & STATEMENT OF EDUCATIONAL PURPOSE (TO BE SIGNED IN THE PRESENCE OF A NOTARY)

If the student is unable to appear in person at Whitman College to verify his or her identity, the student must provide the institution:

- a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and
- b) The original Statement of Educational Purposes provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

### STATEMENT OF EDUCATIONAL PURPOSE

I certify that I, \_\_\_\_\_, am the individual signing this  
*Print Student's Name*  
 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 Whitman College for 2023-24.

\_\_\_\_\_  
 Student's Signature

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Student's ID Number

### NOTARY'S CERTIFICATION OF ACKNOWLEDGMENT: COMPLETE NOTARIZATION ONLY IF SUBMITTING THIS FORM BY MAIL

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

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

On \_\_\_\_\_, before me, \_\_\_\_\_, personally appeared,  
*Date Notary's Name*

\_\_\_\_\_, and proved to me because of satisfactory evidence of  
*Printed name of signer*

Identification \_\_\_\_\_ to be the above-named person who  
*Type of Government-issued photo ID provided*

signed the foregoing instrument.

WITNESS my hand and official seal

\_\_\_\_\_  
*Notary Signature*

Seal

My commission expires on \_\_\_\_\_  
*Date*

If you have any questions, we encourage you to contact Financial Aid Services at (509)527-5178 or e-mail our staff at [finaid@whitman.edu](mailto:finaid@whitman.edu).