



Yeshiva University

2023-2024 Independent Verification Worksheet V5 (Aggregate)

A. Independent 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.)			Student's Date of Birth
City	State	Zip Code	Student's Email Address
Student's Home Phone Number (include area code)			Student's Alternate or Cell Phone Number

B. Family Information

If you are an independent student, include:

- Yourself
- Your spouse, if you are married.
- You or your spouse's children if you or your spouse will provide more than half of their support from July 1, 2023, through June 30, 2024, or if the other children would be required to provide parental information if they were completing a FAFSA for 2023–2024.
- Other people if they now live with you and your spouse and you or your spouse provide more than half of their support and will continue to provide more than half of their support through June 30, 2024.

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

Full Name	Age	Relationship	Name of the College/Degree Program (if at least half-time 2023-2024)
		<i>Self</i>	Yeshiva University

Instructions:

- OnlineRequest - Go to www.irs.gov or IRS2Go app to access "Get a Tax Records." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- TelephoneRequest - 1-800-908-9946
- PaperRequestForm - IRS Form 4506T-EZ or IRS Form 4506-T
- Non-Filers – 4506T <https://www.irs.gov/forms-pubs/about-form-4506-t>

If you filed electronically then you may request a transcript 2-3 weeks after filing – paper filers must wait 8-11 weeks

C. Independent Student and Spouse Income Information to Be Verified :

Check the box that applies if you filed or will file a 2021 IRS income tax return:

- You and/or your spouse have used the IRS Data Retrieval Tool (DRT) in FAFSA on the Web to transfer 2021 IRS income tax return information into your FAFSA.
- You and/or your spouse have not yet used the IRS DRT in FAFSA on the Web, but will use the tool to transfer 2021 IRS income tax return information into your FAFSA once the 2021 IRS income tax return has been filed.
- You and/or your spouse are unable or choose not to use the IRS DRT in FAFSA on the Web, and instead will provide the school a 2021 IRS Tax Return Transcript or a signed copy of your 2021 income tax return with all IRS schedules
- You and/or your spouse will not file a 2021 IRS income tax return, complete the table below and attach copies of ALL 2021 W-2 forms along with the Non-Filer letter from the IRS and continue to section E.

Employer's Name	2021 Amount Earned
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>

D. Verification and Various IRS Issues

- Amended Tax Return - Please submit a 2021 IRS Tax Return Transcript (see instructions above) as well as a signed copy of your filed IRS Form 1040X for 2021.
- IRS Identity Theft – Please submit a Tax Return DataBase View (TRDBV) transcript obtained from the IRS. (Contact the IRS at 1-800-908-4490). Along with a statement signed and dated by the tax filers indicating that they were victims of IRS tax-related identity theft and that the IRS has been made aware of the tax-related identity theft.

DI. 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 2023-2024.

Student's Signature

Date

Student's ID Number

E1. 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 2023-2024.

Student's Signature

Date

Student's ID Number

Notary's Certificate of Acknowledgement

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

WITNESS my hand and official seal

(seal)

Notary signature

My commission expires on _____

Date

F. Certification and Signatures:

Each person signing below certifies that all the information reported is complete and correct. The student and/or spouse whose information was reported on the FAFSA must sign and date

Student's Signature

Date

Spouse Signature

Date

Yeshiva University
Office of Student Aid

500 West 185th Street | New York, New York 10033-3201
Phone 646-592-6250 | Fax 212-960-0037 | Email studentaid@yu.edu

V5- Independent Aggregate



Yeshiva University

2023-2024 Asset Verification Form

Student's Name _____ YU ID# _____
Last First M.I

The following asset information is needed in order to complete the verification process. The figures provided below should reflect values as reported on the date the Free Application for Federal Student Aid (FAFSA) was filed. Please read this form carefully and answer all the questions that apply—do not leave any questions blank, use a zero.

A. SAVINGS: Please report the total value of all savings and checking accounts. The figures provided below will be compared with what you reported on your 2021 tax return, line 2a of the 1040. We will divide the interest income by .01 (1%) if the interest income amount is < \$250 and by .2 (2%) if it is greater than > \$250.

STUDENT/SPOUSE: Checking: _____
Savings: _____

B. REAL ESTATE: If schedule 1 line 17 of your 2021 tax return lists income or loss from rental real estate*, you must complete the following formula:

STUDENT/SPOUSE: Value of property \$ _____
Percentage owned _____
Minus remaining mortgage owed - _____
Estimated current net worth = \$ _____

*Important note: Do not include your family's primary place of residence in property values. You must only include any part of your home that you rent to someone else. For example, if half of the house is rented, use 50% of the current market value minus 50% of the mortgage owed to calculate the net worth. If the amount on line 17 in schedule 1 tax return is the result of a partnership, trust, or S corporation, please explain the arrangement on the back of this form and include the net worth in Section C below.

C. INVESTMENTS: If your tax return showed any dividend income or capital gain, you must report the total net worth of any of your current (unsold) investments. That figure is the total current net worth of your stocks, bonds, and mutual funds, etc. Also include the net worth of any partnerships and/or S corporations and all associated assets. (Do not include retirement accounts anywhere in this form; business assets should be reported in section D).

STUDENT/SPOUSE: Current net worth of investments: \$ _____ (Net worth = Total current market value less associated debt. If the net worth is negative, report a zero).

Check here if you had income from an investment in 2021 but have since sold it; explain how the proceeds were used on the back of this form.

D. BUSINESS: If your tax return shows income (or loss) from a business, and if you have **100** or more employees, you must report the net worth of your business. (Net worth = Total value of land, buildings, machinery, equipment, and inventory less debt. Business debt is only defined as debt for which the business itself was used as collateral).

Please check and complete one of the following two options:

1. Business income reported on your 2021 tax return reflects profits/losses from the operation of a business with 100 or more employees.

Type of Business _____

Total Business Net Worth \$_____ (This will *not* be the same amount reported on your tax return).

2. Business income reported on the 2021 tax return reflects self-employment/freelance earnings with no associated assets, and zero net worth.

Describe nature of work _____

E. ADDITIONAL INFORMATION: Please use the space provided to explain the arrangements of your partnership, trust, or S corporation that generated income or loss from rental real estate.

Please use the space provided to explain the sale of any investment that generated income in 2021 but has since been sold. Be sure to include how the proceeds from that sale were used.

F. SIGNATURE: I hereby confirm that the information herein is true and complete:

Student

Date

Spouse

Date

Yeshiva University
Office of Student Aid

500 West 185th Street | New York, New York 10033-3201

Phone 646-5926250 | Fax 212-960-0037 | Email studentaid@yu.edu