

## V5 - Independent Verification Worksheet 2025 – 2026

***Please TYPE Responses***

Your FAFSA has been selected for a review process called “[Verification](#).” In this process, NAU will be comparing information from your FAFSA application with copies of you and your spouse’s (if applicable) 2023 IRS Tax Return Transcripts, W-2 forms and/or other financial documents. The law requires completion of Verification before awarding and/or disbursing federal aid. If there are differences between your FAFSA application and your verification documentation, electronic corrections to your FAFSA may be required. Please upload the completed form and all supporting documentation to your [Financial Aid Student Portal](#).

### A. STUDENT INFORMATION

Last Name	First Name	M.I.	Student ID #
Address (includes apt. no.)			Date of Birth
City	State	Zip Code	Phone Number

### B. FAMILY SIZE INFORMATION

List yourself (and spouse, if applicable) and the people you/your spouse will provide **more than half of their financial support** for between **July 1, 2025 - June 30, 2026**, in the table below. Do **NOT** include unborn children or people you/your spouse do not provide more than half of their financial support.

1. **Student** – list yourself.
2. **Student’s Spouse** – list your spouse, if married.
3. **Children** – list you and your spouse’s dependent children only if they live with you/your spouse (or live apart because of college enrollment) and you/your spouse will continue to provide more than half of their financial support between **July 1, 2025, and June 30, 2026**.
4. **Other Member(s)** – list other people in your household only if they live with you/your spouse and you/your spouse will continue to provide more than half of their financial support between **July 1, 2025, and June 30, 2026**.

Full Name	Age	Relationship
		Self
		Spouse

*If you need more space, attach a separate page with the student’s name and ID number at the top.*

### C. STUDENT TAX INFORMATION

Check only **ONE** box below and submit the required documentation:

- ☐ I used the [IRS Direct Data Exchange](#) to transfer my 2023 tax information on to my FAFSA.
- ☐ I am unable to use the IRS Direct Data Exchange to transfer my 2023 tax information on to my FAFSA.
  - I am attaching a [2023 IRS Tax Return Transcript](#) or a **SIGNED** 2023 U.S. Income Tax Return **with all applicable schedules**.
- ☐ I will not file and am not required to file a 2023 U.S. Income Tax Return.
  - I am attaching a [2023 Verification of Non-Filing Letter](#) from the IRS.
  - I am attaching my 2023 W-2'(s) (or an equivalent document) from each employer (if applicable).
  - List the names of all employers and the amount earned from each in the table below (if applicable):

Employer Name	2023 Income Amount
	\$
	\$
	\$
	\$
	\$

- ☐ I filed a 2023 income tax return with a tax authority other than the IRS.
  - I am attaching a **SIGNED** copy of the 2023 income tax return filed with the relevant tax authority.

### D. SPOUSE TAX INFORMATION (IF APPLICABLE)

Check only **ONE** box below and submit the required documentation.

- ☐ I used the [IRS Direct Data Exchange](#) to transfer my 2023 tax information on to my spouse's FAFSA.
- ☐ I am unable to use the IRS Direct Data Exchange to transfer my 2023 tax information on to my spouse's FAFSA.
  - I am attaching a [2023 IRS Tax Return Transcript](#) or a **SIGNED** 2023 U.S. Income Tax Return **with all applicable schedules**.
- ☐ I will not file and am not required to file a 2023 U.S. Income Tax Return.
  - I am attaching a [2023 Verification of Non-Filing Letter](#) from the IRS.
  - I am attaching my 2023 W-2'(s) (or an equivalent document) from each employer (if applicable).
  - List the names of all employers and the amount earned from each in the table below (if applicable):

Employer Name	2023 Income Amount
	\$
	\$
	\$
	\$
	\$

- ☐ I filed a 2023 income tax return with a tax authority other than the IRS.
  - I am attaching a **SIGNED** copy of the 2023 income tax return filed with the relevant tax authority.

### E. SIGNATURE & CERTIFICATION

Each person signing this form certifies that all the information reported on it is complete and accurate.

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

Student Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## Identity & Statement of Educational Purpose Verification Form 2025 - 2026

**(To Be Signed at the Institution)**

The student must appear in person at North American University (NAU) 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 Statement of  
(Print Student's Name)

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 North American University for 2025 – 2026.

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's ID Number)

\_\_\_\_\_  
(Financial Aid Advisor's Signature)

\_\_\_\_\_  
(Type of Government-Issued ID Received)

\_\_\_\_\_  
(Date)

## Identity & Statement of Educational Purpose Verification Form 2025 - 2026

**(To Be Signed in the Presence of a Notary)**

If the student is unable to appear in person at North American University to verify his or her identity, the student must provide to 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 Purpose provided below 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 Statement of  
(Print Student's Name)

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 North American University for 2025 – 2026.

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's ID Number)

### Notary's Certificate of Acknowledgement

State of \_\_\_\_\_ City/County of \_\_\_\_\_ On \_\_\_\_\_,  
(Date)

before me, \_\_\_\_\_, personally appeared, \_\_\_\_\_,  
(Notary's name) (Printed name of signer)

and proved to me because of satisfactory evidence of identification \_\_\_\_\_  
(Type of unexpired government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

**WITNESS my hand and official seal**  
(seal)

\_\_\_\_\_  
(Notary Signature)

My commission expires on: \_\_\_\_\_  
(Date)

## F. HELPFUL RESOURCES

### IRS Direct Data Exchange

As part of federal student aid eligibility, students 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 their spouse, if applicable) filed separate 2023 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 2023 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

If 2023 income tax return information was not available or could not be used, the student (and their spouse, if applicable) should provide the institution with a **2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules.**

### IRS Tax Return Transcript

If you are unable to use the IRS Direct Data Exchange, you can obtain a 2023 IRS Tax Return Transcript using one of the following options:

- **Get Transcript by Mail** – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript."
- **Get Transcript Online** – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript."
- **Automated Telephone Request** – 1-800-908-9946.
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T.

Transcripts are generally received within 10 business days from the IRS's receipt of your request except for the "Get Transcript Online" option which displays the transcript upon successful completion of the IRS's two-step authentication.

### Individuals Who Filed Non-IRS Income Tax Returns

A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if the accuracy of the information on the signed copy of the income tax return is questioned, the tax filer must provide a copy of the tax account information issued by the relevant tax authority before verification can be completed.