

**Please submit this document to your respective Financial Aid Office.**

**STEP 1 – STUDENT INFORMATION**

<i>Last Name</i>	<i>First Name</i>	<i>Social Security Number</i>	<i>Student ID Number</i>
<i>Permanent Address</i>	<i>Street &amp; Number</i>	<i>City/State/Zip</i>	<i>Date of Birth</i>
<i>Local Phone Number (Include Area Code)</i>	<i>Permanent Phone Number (Include Area Code)</i>	<i>Email Address</i>	

**STEP 2 – FAMILY INFORMATION**

If you are an **independent student**, include:

- ❖ Yourself
- ❖ Your spouse, if you are married.
- ❖ Your or your spouse's children if you or your spouse will provide more than half of their support from July 1, 2021, through June 30, 2022, even if a child does not live with you.
- ❖ 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, 2022.

For any household member who is, or 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, 2021, and June 30, 2022, include the name of the college.

*If more space is needed, please attach a separate page with your, the student's, name and ID number at the top.*

Full Name	Age	Relationship	Name of College/Degree Program <i>(if at least half-time 2021-2022)</i>
		<i>Self</i>	<i>Columbia University in the City of New York</i>

**Student Last Name:** \_\_\_\_\_

**STEP 3 – STUDENT & SPOUSE TAX TRANSCRIPT & INCOME INFORMATION**

Complete this section if you and/or your spouse filed or will file a 2019 income tax return, or if you and/or your spouse will not file and are not required to file with the IRS or other relevant tax authority. *The best way to verify income from your 2019 US Federal tax return is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at [FAFSA.gov](http://FAFSA.gov).*

**Check the box that applies to your and, if married, your spouse’s 2019 income tax return:**

*It may be appropriate to select multiple boxes if you and your spouse have different responses to the elections below.*

You and/or your spouse have used the IRS DRT in *FAFSA on the Web* to transfer 2019 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 2019 IRS income tax return information into the student’s FAFSA once the 2019 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 **2019 IRS Tax Return Transcript(s) or a signed copy of your 2019 income tax return and applicable schedules from the IRS or other relevant tax authority.**

You and/or your spouse will not file and are not required to file a 2019 income tax return. Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2020 that indicates a 2019 IRS income tax return was not filed with the IRS or other relevant tax authority. Select below:

Check here if you and your spouse, if married were not employed and had no income earned from work in 2019

Check here if you and/or your spouse were employed and had income earned from work in 2019

Name of student and/or spouse who will not file and are not required to file a 2019 income tax return with the IRS or other relevant tax authority.

**Complete the table below only if you and/or your spouse did NOT file taxes and earned income in 2019:**

List below the names of all employers and the amount earned from each employer in 2019. You must provide an IRS W-2 or equivalent document for each source of income from employment listed.

Source of Income (Fill out only if you and/or your spouse did NOT file taxes)	Amount Earned in 2019
<b>TOTAL</b>	

**Student Last Name:** \_\_\_\_\_

### **STEP 3 (continued) – STUDENT & SPOUSE TAX TRANSCRIPT & INCOME INFORMATION**

**Check the box that represents the verification of non-filing document provided for you and/or your spouse only if you and/or your spouse did NOT file taxes in 2019:**

*It may be appropriate to select multiple boxes if you and your spouse have different responses to the elections below.*

Verification of non-filing is provided for you and/or your non-filing spouse.

Verification of non-filing will be provided for you and/or your non-filing spouse later

Your and/or your non-filing spouse have attempted and are unable to obtain verification of non-filing from the IRS or other relevant tax authority.

Your spouse is ineligible to obtain verification of non-filing from the IRS or other relevant tax authority.

**Check the box that applies to your spouse's ineligibility to obtain verification of non-filing:**

*Non-filing individual(s) in foreign countries that do not have a tax authority.*

*Non-filing individual(s) in foreign countries whose tax authority does not provide verification of non-filing or similar documentation.*

*Domestic non-filing individual(s) who do not have a Social Security Number (SSN), Employee Identification Number (EIN), or Individual Taxpayer Identification Number (ITIN). These individuals must provide a signed statement with the students name and ID number at the top certifying they do not have a SSN, an ITIN, or an EIN and listing the sources and amounts of earnings, other income, and resources that supported them for the 2019 tax year.*

### **STEP 4 – HIGH SCHOOL COMPLETION STATUS**

Provide one of the following documents that indicate your high school completion status when you will begin college in 2021–2022: *A student who is unable to obtain the documentation listed below must contact the financial aid office.*

A copy of your high school diploma.

For students who completed secondary education in a foreign country, a copy of the “secondary school leaving certificate” or other similar document.

A copy of your final official high school transcript that shows the date when the diploma was awarded.

A State certificate or transcript received by a student after the student passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).

An academic transcript that indicates you successfully completed at least a two-year program that is acceptable for full credit toward a bachelor’s degree.

If State law requires a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential is required.

If State law does not require a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a transcript or the equivalent, signed by your parent or guardian, that lists the secondary school courses you completed and documents the successful completion of a secondary school education in a homeschool setting.

***Student Last Name:*** \_\_\_\_\_

**STEP 5 – IDENTITY & STATEMENT OF EDUCATIONAL PURPOSE (To Be Signed at the Institution)**

You must appear in person at Columbia University to verify your 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 your 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 your ID.

In addition, you 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 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 Columbia University for 2021-2022.

\_\_\_\_\_  
*Student Signature* *Date* *Student ID Number*

**STEP 5 (a) – IDENTITY & STATEMENT OF EDUCATIONAL PURPOSE (To Be Signed With Notary)**

If you are unable to appear in person at Columbia University to verify your identity, you must provide:

- (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, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be 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 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 Columbia University for 2021-2022.

\_\_\_\_\_  
*Student Signature* *Date* *Student ID Number*

**Notary’s Certificate of Acknowledgement**

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

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

On \_\_\_\_\_, before me, \_\_\_\_\_, personally appeared,  
(Date) (Notary’s name)

\_\_\_\_\_, and proved 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

\_\_\_\_\_  
(Notary signature)

**Student Last Name:** \_\_\_\_\_

(seal)

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

**STEP 6 – CERTIFICATION**

**By signing this worksheet, I certify all the information reported is complete and correct:**

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<i>Student Signature</i>	<i>Date</i>	<i>Student Name (Please Print)</i>	<i>Student ID Number</i>
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<i>Spouse Signature</i>	<i>Date</i>	<i>Spouse (Please Print)</i>
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**NOTE:** Additional documents and/or information beyond those listed in this form may be needed to satisfy the requirements of Verification. Your respective Financial Aid Office will notify you of additional requirements, if applicable.