

# 2025–2026 Independent Verification Form (v5)

**COMPLETE ALL SECTIONS OF THIS FORM: Please complete in link and print legibly.**

\_\_\_\_\_ E \_\_\_\_\_  
 Student's Last Name      Student's First Name      Student's M.I.      Student ID Number or SSN

**A. FAMILY Information (REQUIRED)**

**Complete Each Column.** List the people in your family, as described. Use a separate paper if there are more than 6 people in your family.

- Yourself
- Your spouse, if married
- Your dependent children **IF** you will provide more than half of their financial support from 7/1/25 through 6/30/26.
  - Even if they live apart from you because of college enrollment
- Other people **IF** they now live with you and you will provide more than half of their financial support from 7/1/25 through 6/30/26.

*Full Name of Family Member	*AGE*	*Relationship To Student
		Self
		Spouse (if married)
		<input type="checkbox"/> Child <input type="checkbox"/> Other: _____
		<input type="checkbox"/> Child <input type="checkbox"/> Other: _____
		<input type="checkbox"/> Child <input type="checkbox"/> Other: _____
		<input type="checkbox"/> Child <input type="checkbox"/> Other: _____
		<input type="checkbox"/> Child <input type="checkbox"/> Other: _____

**B. STUDENT Tax and Income Information (REQUIRED)**

**Did you (the STUDENT) file a 2023 Federal Tax Return?**

**YES, I (the STUDENT) filed a 2023 federal tax return with the IRS.** No additional tax documentation is needed if you successfully transferred your federal tax information (FTI) into the FAFSA via the FUTURE Act Direct Data Exchange (FA-DDX). If you consented to the FA-DDX transfer, but your FTI was not successfully transferred you must submit a 2023 Tax Return Transcript or a signed/dated copy of your 2023 Federal Income Tax Return (Form 1040) and all applicable forms/schedules. **Skip to Section D if you are married. If you are not married, skip to Section G.**

**NO.** By checking this box, I confirm that I (the STUDENT) did not, will not, and was not required to file a 2023 federal tax return with the IRS. **You must complete Section C: Student Non Tax Return Filers.**

**C. STUDENT Non Tax Return Filers Only**

**\*\*\* Complete this section if you (the STUDENT) will not file and are not required to file a 2023 federal tax return with the IRS.**

**Please select ONE option below:**

- You (the STUDENT) were not employed and had no income earned from work in 2023. Complete the table below. List any other income and all resources that supported you (the STUDENT).
- You (the STUDENT) were employed in 2023. Complete the table below. List every employer even if no W-2 was issued.

Employers/Resources	Total Income Amount in 2023	Paid in Cash? (Yes or No)	W-2 Attached? (Yes or No)

**D. STUDENT Martial Status (REQUIRED)**

Are you (the STUDENT) legally married?

YES, I (the STUDENT) am legally married.

**Did you and your spouse file jointly on your 2023 Federal Tax Return?**

YES, my spouse and I filed a 2023 federal tax return with the IRS as married, filing jointly. **Skip to Section G.**

NO, my spouse and I did not file jointly on our 2023 federal tax return with the IRS. **Your Spouse must complete Section E: Spouse Tax and Income Information.**

NO. I (the STUDENT) am not legally married. **Skip to Section G.**

**E. SPOUSE Tax and Income Information (IF MARRIED)**

Did you (the SPOUSE) file a 2023 Federal Tax Return?

YES, I (the SPOUSE) filed a 2023 federal tax return with the IRS. No additional tax documentation is needed if you successfully transferred your federal tax information (FTI) into the FAFSA via the FUTURE Act Direct Data Exchange (FA-DDX). If you consented to the FA-DDX transfer, but your FTI was not successfully transferred you must submit a 2023 Tax Return Transcript or a signed/dated copy of your 2023 Federal Income Tax Return (Form 1040) and all applicable forms/schedules. **Skip to Section G.**

➤ Submit documents to [finaid@cui.edu](mailto:finaid@cui.edu); make sure to write your spouse's name and ID# on all submitted documents.

NO. By checking this box, I confirm that I (the SPOUSE) did not, will not, and was not required to file a 2023 federal tax return with the IRS. **You must complete Section F: Spouse Non Tax Return Filers.**

**F. SPOUSE Non Tax Return Filers Only (IF MARRIED)**

\*\*\* Complete this section if you (the SPOUSE) will not file and are not required to file a 2023 federal tax return with the IRS

Please select ONE option below:

You (the SPOUSE) were not employed and had no income earned from work in 2023. Complete the table below. List any other income and all resources that supported you (the SPOUSE).

You (the SPOUSE) were employed in 2023. Complete the table below. List every employer even if no W-2 was issued.

Employers/Resources	Total Income Amount in 2023	Paid in Cash? (Yes or No)	W-2 Attached? (Yes or No)

After completing the table above, SPOUSE must sign on the appropriate line in Section H: Certification Statement.

**\*\*\* Student Must Complete Section G on Page 3 in person\*\*\***

**G. IDENTITY & Statement of Educational Purpose (REQUIRED; Must be signed in person at the Financial Aid Office)**

The student **must appear in person at Concordia University Irvine** 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 Educational Purpose  
*(Print Student’s Name)*  
and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Concordia University, Irvine for 2025–2026.

\_\_\_\_\_  
*(Student’s Signature)*

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

**If the student is unable to appear in person at Concordia University Irvine to verify his or her identity, the student must provide to the institution:**

1. 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**
2. 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 a clear indication that the Statement of Educational Purpose was the document notarized.

**Notary’s Certificate of Acknowledgment**

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

\_\_\_\_\_, personally appeared, \_\_\_\_\_ and proved to me on the basis of satisfactory  
*(Notary’s name)* *(Printed name of signer)*

evidence of identification \_\_\_\_\_ 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)*

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

OFFICE USE ONLY: Date Verified: \_\_\_\_\_ Verified by: \_\_\_\_\_

**H. CERTIFICATION Statement (REQUIRED)**

**I/We, the undersigned, certify that all the information reported to qualify for Federal student aid is complete and correct. If requested, I agree to provide documentation to support the information I have provided on this form.**

**WARNING: If you purposely give false or misleading information on this worksheet, you may be subject to a denial, reduction, withdrawal and/or repayment of financial aid and you may be fined, sentenced to jail, or both, under provisions of the United States Criminal Code.**

\_\_\_\_\_  
Student’s Signature

\_\_\_\_\_  
Student ID #

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature (if married)

**Submit this form in person or by mail (with original notary) to:  
Concordia University Financial Aid Office, 1530 Concordia West, Irvine, CA 92612**