

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, 2017, through June 30, 2018, or if the other children would be required to provide parental information if they were completing a FAFSA for 2017–2018.
- ❖ 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, 2018.

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, 2017, and June 30, 2018, include the name of the college.

If more space is needed, provide a separate page with 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 2017-2018)</i>
		<i>Self</i>	<i>Columbia University in the City of New York</i>

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

Complete this section if you and/or your spouse filed, will file or will not file a 2015 IRS income tax return. *The best way to verify income 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 if you filed or will file a 2015 IRS income tax return:**

You and/or your spouse have used the IRS DRT in *FAFSA on the Web* to transfer 2015 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 2015 IRS income tax return information into the student’s FAFSA once the 2015 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 **2015 IRS Tax Return Transcript**.

You and /or your spouse will not file a 2014 IRS income tax return, complete the table below and attach copies of ALL 2015 W-2 forms and continue to STEP 4.

Source of Income (Fill out only if you did NOT file taxes)	Amount Earned in 2015
<b>TOTAL</b>	

**NOTE: We cannot accept a signed copy of the tax return. To request a Tax Return Transcript or a “W-2 Wage Summary” (if you did not keep a copy of your W-2 form) call the IRS at 800.829.1040. Please be advised that it may take a minimum of three weeks for the IRS to mail these documents to you.**

### **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 2017–2018:

A copy of your high school diploma.

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

A copy of your General Educational Development (GED) certificate or GED transcript.

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 the your parent or guardian, that lists the secondary school courses the student completed and documents the successful completion of a secondary school education in a homeschool setting.

### **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 a valid government-issued photo identification (ID), such as, but not limited to, a driver’s license, other state-issued ID, or passport. The University 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, you 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 Columbia University for 2017-2018.

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*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 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 Columbia University for 2017-2018.

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*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**

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

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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*Student Signature*                      *Date*                      *Student Name (Please Print)*                      *Student ID Number*

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*Spouse Signature*                      *Date*                      *Spouse (Please Print)*