



**Section B: Student's Tax Information** (Print Clearly)

\*Select either 1, 2, 3, or 4 and follow the directions.

1. \_\_\_ I (student) did file a 2024 Federal (IRS) Tax Return.

Did you use the IRS Data Direct Exchange to transfer your tax data directly from the IRS to the 2026-2027 FAFSA?

- Yes. (nothing else needed)
- No. (please submit one of the following)
  - A SIGNED copy of your 2024 Federal IRS Tax Return (1040) or
  - A copy of 2024 Federal Tax Return Transcript or
  - Update your FAFSA and use the Federal IRS Data Direct Exchange.

2. \_\_\_ I (student) did not file a 2024 Federal Tax Return but did earn income in 2024: however, I was not required to file a tax return.

- List all your employers, sources, and resources that supported you for 2024 and what you earned in the table below. Submit all W2 worksheets for each employer with this worksheet. \*Sign and date below the table.

Employer/Sources/Resources in 2024	Amounts Earned in 2024

\*Required Signature (student) \_\_\_\_\_ Date: \_\_\_\_\_

3. \_\_\_ I (student) was not employed in 2024 and had no income earned from work in 2024.

Required Signature (student) \_\_\_\_\_ Date: \_\_\_\_\_

4. \_\_\_ None of these apply to me. Explanation:

\_\_\_\_\_

\_\_\_\_\_

**Section C: Spouses Tax Information** (Print Clearly) (Only complete this section if the student is married.)

\*Select either 1, 2, 3, or 4 and follow the directions below each.

1. \_\_\_ I (spouse) did file a 2024 Federal (IRS) Tax Return.

- Did you use the IRS Data Direct Exchange to transfer your tax data directly from the IRS to the 2026-2027 FAFSA?
- Yes. (nothing else needed)
- No. (please submit one of the following)
  - A SIGNED copy of your 2024 Federal IRS Tax Return (1040) or
  - A copy of 2024 Federal Tax Return Transcript or
  - Update the students FAFSA and use the Federal IRS Data Direct Exchange.

2. \_\_\_ I (spouse) did not file a 2024 Federal Tax Return but did earn income in 2024: however, I was not required to file a tax return.

- List all your employers, sources, and resources that supported you for 2024 and what you earned in the table below. Submit all W2 worksheets for each employer with this worksheet. \*Sign and date below the table.

Employer/Sources/Resources in 2024	Amounts Earned in 2024

\*Required Signature (spouse) \_\_\_\_\_ Date: \_\_\_\_\_

3. \_\_\_ I (spouse) was not employed in 2024 and had no income earned from work in 2024.

Required Signature (spouse) \_\_\_\_\_ Date: \_\_\_\_\_

4. None of these apply to me. Explanation:

\_\_\_\_\_

**Section D: The Statement of Identity (Signing w/ MU)**

- The student must appear in person at Methodist University 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.

As the authorizing official for Methodist University, the above-named student’s signature and Identification were received and reviewed in my presence. A copy of unexpired valid government – issued photo ID is on file in the Office of Financial Aid.

MU Authorizing Officials Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Type of Unexpired Government ID Presented: \_\_\_\_\_

**Section E: The Statement of Identity (Signing w/ Notary)**

- If the student is unable to appear in person at Methodist University to verify his or her identity, the student must provide MU:
  - 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

***Notary’s Certificate of Acknowledgement***

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

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

\_\_\_\_\_ (signer’s printed name) personally appeared before me, \_\_\_\_\_ (notary’s name) on \_\_\_\_\_ (date) and proved to me on basis of satisfactory evidence of identification \_\_\_\_\_ (type of unexpired government-issued photo ID provided) to be the above-named person who signed the forgoing instrument.

WITNESS my hand and official seal: \_\_\_\_\_

My commission expires on: \_\_\_\_\_



Official Seal