



### C. **2015 Tax and Income Documentation**

Read and complete this section even if you did not file a 2015 tax return. As part of verification, the Financial Aid Office is required to collect your official tax data, either through the FAFSA IRS Data Retrieval Tool (DRT) or via an IRS Tax Return Transcript. A copy of your Tax Return (1040, 1040A, or 1040EZ) is **not** acceptable for verification purposes. You must complete at least one of the steps outlined in the chart below.

Additionally, **please attach a 2015 W2** (or equivalent form, such as an IRS 1099) for all income earned from work, even if you and/or your spouse, used the IRS Data Retrieval Tool or are attaching a Tax Return Transcript. **Please note**, if you had a qualifying retirement account rollover please also attach your **2015 1099-R**.

<b>Student</b>
<input type="checkbox"/> I have successfully used the FAFSA's IRS Data Retrieval Tool to load and submit my income information onto the FAFSA. I have also included any W2's or 1099's for income earned.
<input type="checkbox"/> I have not yet, but will use the FAFSA's DRT to transfer my income information onto the FAFSA ( <i>please note verification <b>cannot</b> be completed until this information is received</i> )
<input type="checkbox"/> I am unable or chose not to use the FAFSA's DRT to transfer my income information. I have either attached a copy of my Tax Return Transcript here, or I will request a copy of a Tax Return Transcript to be mailed to me and will then forward it to my Financial Aid Office. I have also included any W2's or 1099's for income earned.
<input type="checkbox"/> I filed an Amended IRS Income Tax Return, I was Granted a Filing Extension by the IRS, I was a victim of IRS Identity Theft, or I filed a Non-IRS Income Tax Return. I will contact the Financial Aid Office for detailed instructions on how to complete verification.
<input type="checkbox"/> I (and/or my spouse) did not and am not required to file a 2015 Federal Tax Return per the IRS filing guidelines <b>and will complete Section D below</b> .

The best way to verify income is by using the IRS Data Retrieval Tool (DRT) on the FAFSA.

If you have not already used the tool:

- Go to [FAFSA.gov](http://FAFSA.gov), log in to the 2017-18 FAFSA record
- Select "Make FAFSA Corrections,"
- Navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS DRT to transfer 2015 IRS income tax information into the FAFSA.
- After uploading tax data, **please be sure to submit the FAFSA**.

Alternatively, you may request a 2015 Federal **Tax Return Transcript** directly from the IRS – *not* a photocopy of your tax return.

An IRS **Tax Return Transcript** may be obtained through:

- Online Request – Go to [www.IRS.gov](http://www.IRS.gov) and click on "Get a Tax Transcript", or call **1-800-908-9946** you will need your Social Security number, date of birth, and the address listed on your tax return.
- IRS2GO App – Available through the Apple Online Store and Google Play
- Paper Request for – IRS Form 4506T-EZ or IRS Form 4506-T

### D. **2015 Tax Return Non-Filers**

Complete this section if you and/or your spouse will not file and are not required per IRS filing guidelines to file a 2015 income tax return with the IRS. More information about who is required to file can be found at [www.IRS.gov](http://www.IRS.gov). If you are required to file a return, but have not, you must file your return in order to be considered for Federal Student Aid. **You may skip this section if you filed a tax return and will be submitting your transcripts.**

If you earned and/or your spouse earned income, please list all earnings from work during 2015 in the table **and attach a 2015 W2 or 1099-MISC for each line item**. Your application cannot be considered complete until all earnings from work can be verified with a W2 or 1099-MISC. **If you did not have any source of income from work in 2015, you must complete the Zero or Low Income Worksheet.**

### D. 2015 Tax Return Non-Filers (continued)

Source of Income from Work in 2015	Student	Spouse	IRS W-2 or 1099 Attached?
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
Total Income from Work in 2015	\$	\$	

For student non-tax filer, provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2016 that indicates a 2015 IRS income tax return was not filed with the IRS or other relevant tax authority. A confirmation of non-filing can be obtained from the IRS using **Form 4506-T** (available at IRS.gov) and checking box 7. If appropriate, a similar confirmation from another taxing authority (e.g., a U.S. territory or a foreign government) is also acceptable.

\_\_\_\_\_ Check here if confirmation of non-filing is provided.

\_\_\_\_\_ Check here if confirmation of non-filing will be provided later. *Please note, verification cannot be completed until this is received.*

### E. Student (and Spouse) Asset Information

Complete all of the following items. Do NOT leave any amount blank; write "0" if the item does not apply or the value is negative.

#### Assets include:

- Money in cash, savings, and checking accounts
- Businesses
- Investment farms
- Other investments, such as real estate (other than the home in which you live), UGMA and UTMA accounts for which you are the owner, stocks, bonds, certificates of deposit, etc.

#### Assets do NOT include:

- The home in which you live
- UGMA and UTMA accounts for which you are the custodian, but not the owner
- The value of life insurance
- Retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.)

#### STUDENT:

Total balance of cash, savings, and checking accounts at the time you completed the FAFSA \_\_\_\_\_

Investments net worth at the time you completed the FAFSA \_\_\_\_\_

Business and/or investment farms net worth at the time you completed the FAFSA \_\_\_\_\_

### F. Certification and Signature

I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet.

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature (if applicable)

\_\_\_\_\_  
Date

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

**It is recommended you make a copy of this worksheet for your records.**