



### C. Income Verification

Complete this section if you, the student and/or your spouse filed a 2015 income tax return with the IRS.

- 1) As part of verification, the Financial Aid Office is also required to collect your official tax data, either through the FAFSA IRS Data Retrieval Tool (DRT), via an IRS Tax Return Transcript, or via receipt of a signed copy of your 2015 Tax Return (1040, 1040A, or 1040EZ). You must complete one of the steps outlined in the chart below.

**Please review and check one of the following:**

<input type="checkbox"/> I have successfully used the FAFSA's IRS Data Retrieval Tool to load my (and my spouse's) income information onto the FAFSA and submitted the FAFSA transaction. <i>Note: This option was only available to students who completed the FAFSA before March 10, 2017; the IRS has since disabled the Data Retrieval Tool.</i>
<input type="checkbox"/> I have attached a <b>signed</b> copy of my <b>2015 Tax Return</b> .
<input type="checkbox"/> I have attached a copy of my <b>2015 Tax Return Transcript</b> .
<input type="checkbox"/> I have not yet submitted a signed copy of my <b>2015 Tax Return</b> or a copy of my <b>2015 Tax Return Transcript</b> to the Financial Aid Office, but I understand that verification <i>cannot</i> be completed until this information is received. <i>Instructions on ordering a Tax Return Transcript can be found below.</i>
<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 did not and am not required to file a 2015 Federal Tax Return. I will complete the <b>Tax Return Non-Fileers</b> section of this form (Section D) below.

- To obtain a 2015 Federal Tax Return Transcript from the IRS, go to [www.irs.gov](http://www.irs.gov) and click on the "Get a Tax Transcript" link, or call **1-800-908-9946**. Make certain to request the "IRS Tax **Return** Transcript" and not the "IRS tax *account* transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2015 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.
- 2) The Financial Aid Office is also required collect a copy of your **2015 W2 (or equivalent, such as an IRS 1099) Form(s)**, even if you attached a Tax Return or Tax Return Transcript, or used the IRS Data Retrieval Tool.

**Please review and check one of the following:**

<input type="checkbox"/> I have <b>attached a 2015 W2</b> (or equivalent document, such as an IRS 1099) <b>for all income earned from work</b> .
<input type="checkbox"/> I am unable to provide a copy of my 2015 W2 (or equivalent) form(s), so I have ordered and attached a <b>2015 IRS Wage and Income Transcript</b> . <i>Instructions on ordering a Wage &amp; Income Transcript can be found below.</i>
<input type="checkbox"/> I have not yet submitted a copy of my W2 (or equivalent) form(s), nor have I attached a copy of my <b>2015 Wage and Income Transcript</b> to the Financial Aid Office, but I understand that verification <i>cannot</i> be completed until this information is received. <i>Instructions on ordering a Wage &amp; Income Transcript can be found below.</i>

- To obtain a 2015 Federal Wage and Income Transcript from the IRS, call **1-800-908-9946** or go to [www.irs.gov](http://www.irs.gov). There, click on the "Get a Tax Transcript" link. Follow the on-screen instructions to log in or to create an IRS account. Once your account is created, make certain to request the **2015 "Wage and Income Transcript,"** and submit this to the Financial Aid Office.

**D. Tax Return Non-Filers**

Complete this section if you, the student and/or your spouse will not file and are not required to file a 2015 income tax return with the IRS, but earned income from work in 2015. 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.

**1. Please review the following:**

By checking this box and signing & dating at the bottom of this form, I certify that I have not filed and am not required to file a 2015 Income Tax return.

**2. In the following table, please list all earnings from work during 2015 and attach a 2015 W2 (or equivalent form, i.e. 1099-MISC) for each line item. Your application cannot be considered complete until all earnings from work are verified.**

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

**E. Verification of Other Untaxed Income**

Complete this section for you and your spouse. **Please indicate “zero” if not applicable. DO NOT LEAVE BLANK.**

- If you did not have any source of work income in 2015, please attach a statement describing how you met your living expenses in 2015.**
- Payments to tax-deferred pension and retirement savings** – List any payment (direct or withheld from earnings) to tax deferred pension and retirement savings plans (e.g., 401(k) or 403(b) plans), including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d codes D, E, F, G, H, and S.

Name of Person (Student or Spouse) Who Made the Payment	Annual Amount Paid in 2015
	\$
	\$
	\$
	\$
<b>Total Payments to Tax-deferred Pension and Retirement Savings:</b>	\$

**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. If married, the spouse's signature is optional.

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

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Print Student's Name

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Print Spouse's Name

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Student's Signature

Date

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Spouse's Signature

Date