



**B. Tax Return/Income Verification: (Please check the line that applies.)**

The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of the FAFSA and is available at [www.FAFSA.gov](http://www.FAFSA.gov). If the IRS Data Tool was not used in the application, the student should log into the FAFSA, click on "Make FAFSA Corrections," then on the *Financial Information* section. This section provides instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2016 income tax information into the FAFSA. **Please be advised that individuals who used the "Married, Filing Separately" option to file taxes cannot use this tool.**

**Student/Spouse (if married):**

- I have used the IRS Data Retrieval Tool to transfer my 2016 Income Tax Return information. (**Go to Section D.**)
- I **did not** use the IRS Data Retrieval Tool. **Attach** a copy of the 2016 Tax Transcript ([www.irs.gov](http://www.irs.gov)) (**Go to Section D.**)
- I certify that I did not, will not, and am not required to file a 2016 Income Tax Return. (**Go to Section C.**)
- I amended the 2016 Tax Return. **Attach** a signed **copy of the 1040X Form and Tax Transcripts.** (**Go to Section D.**)
- I have filed for an extension of the 2016 tax year and have attached a copy of *IRS Form 4868*, the approval of the extension, a signed *IRS 1040 Form, W-2 Forms*, and a signed statement (if self-employed) certifying the Adjusted Gross Income (AGI) and the U.S. income tax paid for 2016.
- I am a victim of identity theft and **have attached** the *Tax Return Database View Transcript (TRDBV)* from the IRS or any other IRS tax transcripts that include all of the income and tax information that require verification within the process, as well as a signed and dated statement from the tax filer.  
 (To obtain documents or assistance, contact the IRS at 1.800.908.4490.)

**Parent(s)/Step-Parents:**

- I/We have used the IRS Data Retrieval Tool to transfer 2016 Income Tax Return information. (**Go to Section D.**)
- I **did not** use the IRS Data Retrieval Tool. **Attach** a copy of the 2016 Tax Transcript ([www.irs.gov](http://www.irs.gov)) (**Go to Section D.**)
- I/We certify that I/We did not, will not, and am/are not required to file a 2016 U.S. Income Tax Return. (**Go to Section C.**)
- I/We amended the 2016 Tax Return. **Attach** a signed **copy of the 1040X Form and tax transcripts.** (**Go to Section D.**)
- I/We have filed an extension for the 2016 tax year and have attached a copy of *IRS Form 4868*, the approval of the extension, a signed *IRS 1040 Form, W-2 Forms*, and a signed statement (if self-employed) certifying the Adjusted Gross Income (AGI) and the U.S. income tax paid for 2016.
- I am/We are victim(s) of identity theft and **have attached** the *Tax Return Database View Transcript (TRDBV)* from the IRS or any other IRS tax transcripts that include the income and tax information that require verification within the process, as well as a signed and dated statement from the tax filer.  
 (To obtain documents or assistance, contact the IRS at 1.800.908.4490.)

**C. Non-Tax Filers Income Information: (Please read below and fill in the box.)**

- If you earned an income in 2016 and were not required to file a 2016 Income Tax Return, **list your employer(s)** below and **any other income received.** (Note: In most situations, a total income above \$10,150 requires that a Tax Return to be filed.)
- Attach all earning statements such as *W-2 Forms* and/or *1099 Forms*. If you do not have a *1099 Form* and worked for yourself, please provide a signed statement that includes the source of income, total taxes paid, and the Adjusted Gross Income (AGI).
- If you do not have a *1099 Form* and did not work, please provide a signed statement that includes your source of income, total tax paid, and the Adjusted Gross Income (AGI).

**If for any reason the information you provide is questionable based on professional judgment, the College may require additional documentation. Please do not leave this section blank. If an area is not applicable, enter "N/A."**

<u>Employer Name/Source of Income</u>	<u>W-2 and/or 2016 1099 forms attached?</u> (Please check.)	<u>Student 2016 Annual Amount</u>	<u>Parent(s)/Step-Parent Annual Amount</u>
1. _____	Yes ___ No ___	_____	_____
2. _____	Yes ___ No ___	_____	_____
3. _____	Yes ___ No ___	_____	_____
4. _____	Yes ___ No ___	_____	_____

**D. Untaxed and Investment Income: (Do not leave this section blank.)**

Even if the student and parent(s)/step-parent have situations that pertain to the above sections, all individual(s) must complete this section in its entirety and attach all relevant *W-2 Forms* and/or *1099 Forms*. If an individual does not have a *1099 Form* and has not worked, please provide a signed statement that includes the source of your income, total tax paid, and the Adjusted Gross Income (AGI).

**Sources of Untaxed Income**
**Student (2016 Amount)**
**Parent(s)/Step-Parent (2016 Amount)**

Do you have an IRA Distribution from your IRS Form, 1040, or 1040A rollover amount?

YES: \_\_\_

NO: \_\_\_

YES: \_\_\_

NO: \_\_\_

Do you have a pension distribution from your IRS form, 1040, or 1040A rollover amount?

YES: \_\_\_

NO: \_\_\_

YES: \_\_\_

NO: \_\_\_

Do you have other untaxed income or benefits not mentioned on this form? List this income in Section C of this form.

YES: \_\_\_

NO: \_\_\_

YES: \_\_\_

NO: \_\_\_

**E. High School Completion Status: (Please select the situation describes the student's completion status.)**

 \_\_\_ **High School Diploma**

Please include a copy of the high school diploma or copy of the final high school transcript that includes the date of completion.

 \_\_\_ **GED Completion**

Please include a copy of the GED Certificate or an official copy of the GED Transcript.

 \_\_\_ **State Certificate**

Please provide a copy of the certificate that the student received after passing a state-authorized examination that is recognized as the equivalent of a diploma.

 \_\_\_ **Associate Program Completion**

Please provide evidence of an official transcript showing that the student completed at least a two-year degree that is acceptable for full credit toward a baccalaureate degree.

 \_\_\_ **Completion of Secondary Education in a Foreign Country**

Please provide documentation via a "secondary school leaving certificate" (or another similar document) that shows completion of secondary education.

 \_\_\_ **Home Schooled Students**

Please provide a transcript (or the equivalent) that is signed by the student's parent or guardian and lists the secondary courses that the student completed. Please also submit a statement that the student successfully completed a secondary school education in a home-school setting.

**Validity of Identification and Statement of Educational Purpose:** Please check the situation above that indicates your high school completion status. Please submit in person an unexpired, valid, government-issued photo identification. Identification cards may include, but are not limited to, a driver's license, state-issued identification, military identification, or passport.

**Please note: Copies will not be accepted under any circumstance.**

I, \_\_\_\_\_, (the student) certify that I am the individual signing this **Statement of Educational Purpose** and that any federal financial aid assistance I receive will only be used for educational purposes, including the cost of attending Polk State College during Academic Year 2018-2019.

 \_\_\_\_\_  
 NOTARY STAMP

 \_\_\_\_\_  
 DATE

 \_\_\_\_\_  
 Signature of Notary

 \_\_\_\_\_  
 Received By (Student Financial Services Employee Only)

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

 \_\_\_\_\_  
 Date

 \_\_\_\_\_  
 Parent Signature (if dependent)/Spouse

 \_\_\_\_\_  
 Date

 Office of Student Financial Services  
 999 Avenue H NE  
 Winter Haven, FL 33881-4299  
 Phone: 863.297.1004  
 Fax: 863.298.6850; E-mail: [financialaid@polk.edu](mailto:financialaid@polk.edu)