

## Student Financial Services

**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.studentaid.gov](http://www.studentaid.gov). If the IRS Data Tool was not used in the application, the student should log into the FAFSA, click on "MakeFAFSA 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 2020 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 *2020 Income Tax Return* information. (**Go to Section D.**)
- ☐ I **did not** use the IRS Data Retrieval Tool. **Attach** a copy of the *2020 Tax Transcript* ([www.irs.gov](http://www.irs.gov)) or a signed *2020 Tax Return*. (**Go to Section D.**)
- ☐ I certify that I did not, will not, and am not required to file a *2020 Income Tax Return*. (**Go to Section C.**)
- ☐ I amended the *2020 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 *2020 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 *2020*.
- ☐ I am a victim of identity theft and **have attached** the *2020 Tax Return Database View Transcript* (TRDBV) from the IRS or any other IRS tax transcripts that include all 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)/Stepparents:**

- ☐ I/We have used the IRS Data Retrieval Tool to transfer *2020 Income Tax Return* information. (**Go to Section D.**)
- ☐ I **did not** use the IRS Data Retrieval Tool. **Attach** a copy of the *2020 Tax Transcript* ([www.irs.gov](http://www.irs.gov)) or a signed *2020 Tax Return*. The signature belongs on the second page of the *Tax Return Form*. (**Go to Section D.**)
- ☐ I/We certify that I/We did not, will not, and am/are not required to file a *2020 U.S. Income Tax Return*. (**Go to Section C.**)
- ☐ I/We amended the *2020 Tax Return*. **Attach** a signed **copy of the 2020 1040X Form and tax transcripts**. (**Go to Section D.**)
- ☐ I/We have filed an extension for the *2020 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 *2020*.
- ☐ I am/We are victim(s) of identity theft and **have attached** the *2020 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 2020 and were not required to file a *2020 Income Tax Return*, **list your employer(s)** below and **any other income received**. (Note: In most situations, a minimum total income of \$12,000 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."**

Employer Name/Source of Income (Please check.)	W-2 and/or 2020 1099 forms attached?	Student 2020 Annual Amount	Parent(s)/Stepparent Annual Amount
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)/stepparent 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**

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

**Student (2020 Amount)**

YES: \_\_\_\_ NO: \_\_\_\_

**Parent(s)/Stepparent (2020 Amount)**

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 2020 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:** Students must provide one of the following documents to the Polk State College Admissions Office. Please check the box that indicates the high school completion status. *\*Please select only one box.*

*This pertains to the student only.*

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

A copy of the high school diploma or copy of the final high school transcript that includes the date of completion.

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

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

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

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

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

A copy of the GED Certificate or an official copy of the GED Transcript.

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

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.

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

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.

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

\_\_\_\_\_  
 Date

\_\_\_\_\_  
**Parent Signature (if dependent) or Spouse**

\_\_\_\_\_  
 Date



## Student Financial Services

**Validity of Identification and Statement of Educational Purpose:** Please mail a copy of an unexpired valid government-issued photo identification. Acceptable identification cards include, but are not limited to a driver's license, state-issued identification, or passport. Print the Statement of Educational Purpose (below), and have it notarized.

**Note: Only the original notarized Statement of Educational Purpose will be accepted.**

### Student Information

Student Name:	Student ID:
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### Identity and Statement of Educational Purpose (to be signed with notary)

I, \_\_\_\_\_, (the student) certify that I am the individual signing this **Statement of Educational Purpose** and that the federal financial aid assistance I may receive will only be used for educational purposes to pay for the cost of attending Polk State College for **2022-2023** Academic Year.

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

\_\_\_\_\_  
Notary Stamp                      Date

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

**Mail this original notarized form to:**

Office of Student Financial Services  
999 Avenue H NE  
Winter Haven, FL 33881-4299