

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. If the IRS Retrieval 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 2021 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 2021 *Income Tax Return* information. **(Go to Section D)**
- I **did not** use the IRS Data Retrieval Tool. **Attach** a copy of the 2021 *Tax Transcript* (www.irs.gov) or a signed 2021 *Tax Return*. **(Go to Section D)**
- I certify that I did not, will not, and am not required to file a 2021 *Income Tax Return*. **(Go to Section C)**
- I amended the 2021 *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 2021 tax year and have attached a copy of *IRS Form 4868*, the approval of the extension, a signed 2021 *IRS 1040 Form*, 2021 *W-2 Forms*, and a signed statement (if self-employed) certifying the Adjusted Gross Income (AGI) and the U.S. income tax paid for 2021.
- I am a victim of identity theft and **have attached** the 2021 *Tax Return Database View Transcript* (TRDBV) from the IRS or any other IRS tax transcripts that include all 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)/Stepparent:

- I/We have used the IRS Data Retrieval Tool to transfer 2021 *Income Tax Return* information. **(Go to Section D)**
- I **did not** use the IRS Data Retrieval Tool. **Attach** a copy of the 2021 *Tax Transcript* (www.irs.gov) or a signed 2021 *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 2021 *U.S. Income Tax Return*. **(Go to Section C)**
- I/We amended the 2021 *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 2021 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 2021.
- 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 2021 and were not required to file a 2021 *Income Tax Return*, **list your employer(s)** below and **any other income received**. (Note: In most situations, a total income above \$12,550 requires that a tax return 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 2021 1099 forms attached?</u>	<u>Student 2021 Annual Amount</u>	<u>Parent(s)/Stepparent(s) Annual Amount</u>
(Please check.)			
1. _____	___ Yes ___ No	_____	_____
2. _____	___ Yes ___ No	_____	_____
3. _____	___ Yes ___ No	_____	_____
4. _____	___ Yes ___ No	_____	_____

Note: In most situations, a total income of \$12,550 or more requires that a tax return be filed. If this applies, please do not complete this section. Instead, submit a 2021 *Tax Return Form* to the IRS, and then bring your signed 2021 *Tax Return Form* to the College to complete the verification process.

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. **(Attach all relevant 2021 W-2 Forms and/or 1099 Forms.)**

Sources of Untaxed Income**Student (2021 Amount)****Parent(s)/Stepparent (2021 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 2021 untaxed income or benefits not mentioned on this form? List this income in Section C of this form.

YES:___ NO:___

YES:___ NO:___

Student Signature_____
Date_____
Parent Signature (if dependent)_____
Date

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