

2017–2018 INDEPENDENT STUDENT 2015 IRS INCOME TAX VERIFICATION



Student's Name _____ Student ID or SSN _____

Your 2017–2018 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, Life University may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information the verification coordinator will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected.

INCOME VERIFICATION

If the student and/or spouse filed a 2015 Federal Income Tax Return, you must either give the Internal Revenue Service (IRS) permission to transfer all 2015 tax information directly to your FAFSA using the IRS Data Retrieval Tool **OR** submit a 2015 IRS Tax Return Transcript to the Office of Financial Aid. We recommend using the IRS Data Retrieval Tool on the FAFSA in lieu of submitting an IRS Tax Transcript. Instructions for obtaining both options are on page 2.

If the student and/or spouse did not file and are not required to file a 2015 IRS Income Tax Return, you are **required** to submit a 2015 Verification of Non-Filing Letter and all W-2 forms. Instructions for obtaining a Verification of Non-Filing Letter are on page 2.

STUDENT TAX INFORMATION

I DID FILE A 2015 IRS Tax Return and:

- I DID** use the IRS Data Retrieval Tool when completing the FAFSA and did not change the IRS information.
- I DID NOT** use the IRS Data Retrieval Tool and am submitting my 2015 Tax Return Transcript with this form. If you already submitted your transcript to our office for the 2016-2017 academic year, you do not need to submit it again.
- I WILL** use the IRS Data Retrieval Tool to transfer my 2015 IRS income tax information onto the FAFSA.

I DID NOT and WAS NOT REQUIRED to file a 2015 IRS Tax Return.

- I am submitting a **2015 Verification of Non-Filing Letter** confirming that a tax return for 2015 was not filed and:
 - I was NOT employed and had no income earned from work in 2015.
 - I did work during the 2015 year and am submitting the W-2's. List below employer's name and income amount earned in 2015. If more space is needed, attach a separate sheet with name and student ID.

| Student Employer's Name: | 2015 Amount Earned |
|--------------------------|--------------------|
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SPOUSE TAX INFORMATION

My spouse **DID FILE A 2015 IRS Tax Return and:**

- My spouse **DID** use the IRS Data Retrieval Tool when completing the FAFSA and did not change the IRS information.
- My spouse **DID NOT** use the IRS Data Retrieval Tool. I am submitting my spouse's 2015 Tax Return Transcript with this form. If you already submitted this transcript to our office for the 2016-2017 academic year, you do not need to submit it again.
- My spouse **WILL** use the IRS Data Retrieval Tool to transfer his/her 2015 IRS income tax information onto the FAFSA.

Non-Filing spouse - complete next section on page 2.

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- My spouse **DID NOT and WAS NOT REQUIRED to file a 2015 IRS Tax Return.**
- I am submitting my spouse's **2015 Verification of Non-Filing Letter** confirming that a tax return for 2015 was not filed and:
- My spouse was NOT employed and had no income earned from work in 2015.
 - My spouse did work during the 2015 year and I am submitting the W-2's. List below employer's name and income amount earned in 2015. If more space is needed, attach a separate sheet with name and student ID.

| Spouse Employer's Name: | 2015 Amount Earned |
|-------------------------|--------------------|
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If student's spouse filed a separate 2015 IRS income tax return, a 2015 Tax Return Transcript must be provided for both. If applicable, a separate 2015 Verification of Non-Filing Letter must be provided for both.

REQUIRED SIGNATURE

By signing this worksheet, I certify that all the information reported on it is complete and correct. I understand that purposely giving false or misleading information regarding eligibility for Federal or State Aid may result in fines, jail terms or both. I will provide any additional documentation required.

Student's Signature _____ Date _____

INSTRUCTIONS ON OBTAINING DOCUMENTATION

Instructions for the IRS Data Retrieval Tool:

- If the student/spouse has not already used the tool, go to www.FAFSA.gov, log in to the student's FAFSA, select "Make FAFSA Corrections" and navigate to the Financial Information section of the form. Follow the instructions to determine if the student/spouse is eligible to use the IRS Data Retrieval Tool to transfer 2015 IRS income tax information.

Instructions for obtaining a 2015 IRS Tax Return Transcript:

- **Online Request:** Visit www.IRS.gov, under the Tools heading on the homepage, click "Get a Tax Transcript." You can either choose "Get Transcript Online" or "Get Transcript by Mail." Request the "IRS Tax Return Transcript" NOT the "IRS Tax Account Transcript."
- **Telephone Request:** 1-800-908-9946. Request the "IRS Tax Return Transcript" NOT the "IRS Tax Account Transcript."
- **Paper Request:** IRS Form 4506T-EZ or IRS Form 4506-T

Instructions for obtaining a 2015 Verification of Non-Filing Letter:

- **Online Request:** Visit www.IRS.gov, under the Tools heading on the homepage, click "Get a Tax Transcript." You can either choose "Get Transcript Online" or "Get Transcript by Mail." Request the "Verification of Non-Filing Letter" option.
- **Telephone Request:** 1-800-908-9946
- **Paper Request:** IRS Form 4506-T and check box 7