



Student's Name: \_\_\_\_\_ ID# \_\_\_\_\_

**Important information regarding tax data and verification:**

▪ *A Federal Tax Return Transcript or a signed copy of the original 1040 (A, EZ) are acceptable for the Federal Verification Process. Please provide either a signed copy of your 1040 (A, EZ), or follow the below instructions to obtain a tax return transcript:*

- ♦ **Get Transcript by Mail** -- Go to [www.irs.gov](http://www.irs.gov), under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- ♦ **Get Transcript ONLINE** -- Go to [www.irs.gov](http://www.irs.gov), under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- ♦ **Telephone Request** - 1--800--908--9946
- ♦ **Paper Request Form** - Use the links to download IRS Form [4506T-EZ](#) or IRS Form [4506-T](#) and submit to the IRS

▪ *When requesting tax return transcripts, use the Social Security Number (or the IRS individual taxpayer identification number) and the date of birth of the first person listed on the 2015 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2015 IRS income tax return). You may be eligible to print your tax return transcript upon account access. If not, your request will be mailed to you in 5-7 business days. **If both parents filed separate 2015 returns, tax return transcript(s) or signed copies of the 1040's (A, EZ) must be provided for each parent.***

**C. Dependent Student's Income Information to Be Verified**

*Student 2015 Tax and Income Information:*

The student has attached a 2015 IRS Tax Return Transcript(s) or signed copy of 1040 (A, EZ)

*Student 2015 Non-Filers Section:*

You must complete this section if you did not file and were not required to file a 2015 income tax return with the IRS:

I, \_\_\_\_\_, declare that I did not and was not required to file a tax return for 2015. If employed in 2015, I am listing below any employers and income earned in 2015, as well as providing the associated W2 forms for 2015.

Provide all copies of W2's issued for 2015.

Employer's Name/Unearned Income Source	2015 Amount Earned	Was IRS W-2 Provided Yes/No
<i>Example: Dillon's Food Truck</i>	<i>\$3,013.83</i>	<i>Yes</i>

Student Signature for Non-filers declaration: \_\_\_\_\_ Date: \_\_\_\_\_

Student's Name: \_\_\_\_\_ ID# \_\_\_\_\_

### D. Parent's Income Information to Be Verified

▪If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

#### Parent 2015 Tax and Income Information:

The parent(s) have attached a 2015 IRS Tax Return Transcript(s) or signed copy of 1040 (A, EZ)

#### Parent 2015 Non-Filers Section:

Please complete if you did not file and were not required to file a 2015 income tax return with the IRS, in addition to providing the Non-Filers statement from the IRS for 2015.

If the student's parent(s) did not file a tax return for 2015, he/she/they **MUST** obtain Non-Filers statement for 2015. You must provide documentation from the IRS dated on or after October 1, 2016 that indicates a 2015 IRS income tax return was not filed with the IRS. Documentation includes a verification of non-filing letter from the IRS. See instructions on page 5. Also provide all copies of W2's issued for 2015.

Employer's Name/Unearned Income Source	2015 Amount Earned	Was IRS W-2 Provided Yes/No
<i>Example: Dillon's Food Truck</i>	<i>\$3,013.83</i>	<i>Yes</i>

### E. Child Support Paid

Parent (Dependent Students)

Did the **parent(s) you live with pay** child support in 2015?

No       Yes (Please certify the following)

Name of Person to Whom **the child support was paid** in 2015: \_\_\_\_\_ Total Paid: \$ \_\_\_\_\_

Name of Child(ren): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*\*If you need additional space, please write on the back of this form*

### F. SNAP Benefits

Complete this section if someone in the student's parent's household received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2014 or 2015 calendar years. If asked by the student's school, I will provide documentation of the receipt of SNAP benefits during 2014 and/or 2015.

- Yes, a household member received SNAP in 2014/2015
- No, none of the household members received SNAP in 2014/2015

Student's Name: \_\_\_\_\_ ID# \_\_\_\_\_

### G. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent must sign and date.

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Student's Signature

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Date

-----  
Parent's Signature

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Date

***Submit this worksheet to the financial aid administrator at your school. You should make a copy of this worksheet for your records. WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.***

#### **\*\*Verification of 2015 IRS Income Tax Return Information for Individuals with Unusual Circumstances\*\***

##### ***-Verification of 2015 IRS Income Tax Return Information for Individuals Who Filed an Amended IRS Income Tax Return***

If an individual filed an amended IRS income tax return for tax year 2015, provide both of the following:

- A 2015 IRS Tax Return Transcript for the 2015 tax year; and
- A signed copy of the 2015 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

##### ***--Verification of Non-filers for 2015 IRS Income Tax Return Information***

- Visit [www.irs.gov](http://www.irs.gov) and follow steps to request a tax return transcript for 2015; or
- Complete form 4506-T Request for Tax Return Transcript (available at [www.irs.gov](http://www.irs.gov)) and mail/fax it to the address/fax number on the form
- Either option will generate a non-filers letter for tax year requested, provide this letter to SFS

##### ***-Verification of 2015 IRS Income Tax Return Information for Individuals Who Were Victims of IRS Identity Theft***

- A victim of IRS identity theft who is not able to obtain a **2015 IRS Tax Return Transcript** must contact the IRS Identity Protection Specialized Unit at 1- 800-908-4490 to obtain a Tax Return Data Base View of 2015 IRS income tax return information (a TRDBV version transcript.)
- A statement signed and dated by the tax filer indicating that they were victims of IRS tax-related identity theft and that the IRS has been made aware of the tax-related identity theft.

##### ***-Verification of 2015 IRS Income Tax Return Information for Individuals Who Filed Non-IRS Income Tax Returns***

- An individual who filed or will file a 2015 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, must provide a signed copy of that 2015 income tax return(s).

**\*\*Other forms are available at [www.iona.edu/onlineforms](http://www.iona.edu/onlineforms)**

**\*\*Other resources:**

Internal Revenue Service: [www.irs.gov](http://www.irs.gov); 1-800-829-1040

FAFSA: [www.fafsa.ed.gov](http://www.fafsa.ed.gov); 1-800-4-FED-AID

Student Financial Services: [www.iona.edu/Student-Life/Student-Financial-Services](http://www.iona.edu/Student-Life/Student-Financial-Services); 914-633-2497; [sfs@iona.edu](mailto:sfs@iona.edu)