



Student's name _____ Valpo ID # _____

Section A: Tax Return Transcripts and W-2 Forms

Federal Tax Transcripts, W-2 forms and additional financial information is needed to complete your financial aid file. Your financial aid will not show on your billing statement or on your student account until requested items have been received and reviewed. Below are some helpful hints to insure submitted items are correct and complete.

Federal Income Tax information

⇒ If you did not use the IRS import feature when completing your FAFSA, you may either update your tax information on your FAFSA by using the IRS import or you must request a copy of your tax return transcript from the IRS. To do so, you can use IRS Form 4506-T (which you may print from our web site at www.valpo.edu/financialaid/forms) or call the IRS at 1.800.829.1040.

Dependent Students: If your parent's taxes are requested, which parent's tax return do we need?

(Custodial parent means the parent who you have lived with most during the 12 months prior to filing the FAFSA.)

- My parents are married and filed a joint return: Use the FAFSA's IRS import or request a tax transcript.
- My parents are married and filed separate tax returns: Please request both Tax Transcripts. They're not eligible for the IRS import.
- My parents are divorced or separated: Use the FAFSA's IRS import or request a tax transcript for your custodial parent.
- My custodial parent is remarried and filed a joint return: Use the FAFSA's IRS import or request a tax transcript.
- My custodial parent is remarried and filed a separate return: Please request a tax transcript for your parent and step-parent.
- My custodial parent is single (or widowed and not remarried): Use the FAFSA's IRS import or request a tax transcript.
- My parents are not married, but live together: Use the FAFSA's IRS import or request a tax transcript of the higher wage earner.

Married students: You will need to provide your spouse's income on the FAFSA.

- My spouse and I filed a joint return: Use the IRS import or request a tax transcript.
- My spouse and I filed separate returns: Please request a Tax Transcript for both of you. You are not eligible for the IRS import.

Foreign tax filers: Please request a transcript of your return from the government through which the return was filed.

W-2 Forms

If employed the prior year, W-2 forms are needed for everyone listed on the FAFSA even if a federal tax return was not filed. Please submit a legible copy of each W-2 that was received. If you can not locate a form, please contact the employer. They can send you another copy. Or you may request a copy from the IRS (by submitting the IRS form 4506-T which is available on our web site.)

Section B: Non Tax Filers

Do you need to file a tax return? Please refer to www.IRS.gov for more specific filing requirement, but typically you must file if:

- A. You are married and your combined gross income is more than \$19,000 (if filing separate: must file with income over \$3,700)
- B. Single (with a dependent-filing as head of household) and gross income is more than \$12,200
- C. Single (and parents claim you on their tax return) and earned income is more than \$5,800
- D. Single (and parents can not claim you on their tax return) and gross income is more than \$9,500

Student (and spouse for married students):

- I (we) did not work, do not have W-2 forms, and are not filing a federal tax return
- I (we) did work, my (our) income was lower than the amount listed above, and are not filing a federal tax return. (please submit all W-2 forms)
- I (we) did work and earned more than the amounts listed above, but I (we) will not be filing a federal tax return. (Please note that you will not be eligible for financial aid.)

Parent(s):

- My parent(s) did not work, do not have W-2 forms, and are not filing a federal tax return.
- My parent(s) did work, their income was lower than the amount listed above, and are not filing a federal tax return. (please submit W-2 form)
- My parent(s) did work and earned more than the amounts above, but will not be filing a federal tax return. (Please note that you will not be eligible for financial aid.)

Please list amounts for all items listed below. If zero, write 0

Student (and spouse)	Section C: 2011 Untaxed Income Information	Parent
	List the amount of child support that you received for all children, during the year. <u>Do not</u> include money received for foster care or adoption payments	
	List amount of housing allowances received. <u>Clergy</u> : include amount of (used) cash payment or value of parsonage. <u>Military</u> : include amount received over the "basic" military allowance for housing. Do not include value of on-based military housing.	
	List the amount of veterans non-education benefits received. This would include benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	
	List amount of <u>untaxed</u> worker's compensation or disability income that you received.	
	List amount of any money that you received, or was paid on your behalf (e.g., bills), not reported elsewhere on this form or on your tax return. Do not include welfare payments, untaxed Social Security benefits, Supplemental Security Income, combat pay, or flexible spending arrangements.	XXXXXXXXXXXXXX XXXXXXXXXXXXXX
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	IRA distributions: If you have a difference between lines 15a minus 15b from the IRS form 1040 (or lines 11a minus 11b from the IRS form 1040A) , was this amount was a rollover?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Pension distributions: If you have a difference between lines 16a minus 16b from the IRS form 1040 (or lines 12a minus 12b from the IRS form 1040A) , was the amount a rollover?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Student (and spouse)	Section D: Additional Financial Information	Parent
	Child Support you <u>paid</u> during 2011 because of divorce or separation or as a result of a legal requirement. <u>Do not</u> include support for children living in your household. Name of the person to whom support was paid: _____ Name(s) of the child(ren) for whom support was paid: _____ _____	
	How much of the income listed on your 2011 tax return was earned from employment through the Federal Work-Study program or from employment portions of fellowships and assistantships or earning for work under a co-op program?	
	How much of the income listed on your 2011 tax return was from grant or scholarships? Be sure to include grant/scholarship portions of fellowships and assistantships and AmeriCorps benefits. (Only grant and scholarship amounts above tuition, fees and books are taxable.)	
	Combat pay or special combat pay. Only enter the amount that was taxable and included in your 2011 adjusted gross income. Do not enter untaxed combat pay as reported on the W-2 in Box 12 Code Q.	

Student Signature _____ Date _____

Parent Signature _____ Date _____
(required for dependent students)

Please return completed form to the Office of Financial Aid.