



## C. STUDENT FEDERAL TAX RETURN STATUS

*(Check one of the boxes below)*

I **HAVE FILED** a 2013 Federal tax return

Complete the IRS data retrieval tool or order a copy of the tax RETURN transcript and submit to the Financial Aid Office along with copies of ALL W-2 wage statements, and/or Schedule K-1 (form 1065, if applicable), and Schedule C from the federal tax return.

\_\_\_ Please check here if you have completed or plan to complete the IRS Data Retrieval Tool once the student IRS tax return has been filed

- To complete the IRS data retrieval tool, go to [www.FAFSA.gov](http://www.FAFSA.gov), log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section at the top of the page. From there, follow the instructions to determine if the parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2013 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS data retrieval tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. Please view the instructional tutorial at [www.saintmarys.edu/verification-changes](http://www.saintmarys.edu/verification-changes) for further details regarding the IRS data retrieval process.

\_\_\_ Please check here if you are unable or choose not to complete the IRS Data Retrieval Tool, and you will instead submit a copy of the 2013 IRS tax RETURN transcript of the income tax return to the school

- To obtain an IRS tax RETURN transcript, go to [www.irs.gov](http://www.irs.gov) and click on the "Get transcript for my tax records" link, or call the IRS at 1-800-908-9946. Make sure you order the "IRS tax RETURN transcript" and **not** the "IRS tax ACCOUNT transcript." The student will need her Social Security number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2013 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers.

I have an **EXTENSION** to file a 2013 Federal tax return. The extension expires: \_\_\_\_\_.

Submit a copy of tax extension Form 4868 along with a written and signed statement of estimated AGI (adjusted gross income) and copies of all W-2 wage statements and/or Schedule K1 (form 1065) to the Financial Aid Office.

*\*\*Note the financial aid file will remain incomplete until the IRS Data Retrieval Tool is completed or a copy of the tax return transcript, W-2 statements and all required Schedules are submitted to the Financial Aid Office.*

I **AM NOT FILING** a 2013 Federal tax return because I did not work during 2013, or

I **AM NOT FILING** a 2013 Federal tax return because I worked in 2013 but was not required to file a tax return.

*List your employers below whether or not you received W2 wages statements. If you did receive W2 wages statements, please forward copies of each to the Financial Aid Office.*

<u>Employer's Name</u>	<u>2013 Amount Earned</u>
	\$
	\$
	\$
	\$

## D. SPOUSE FEDERAL TAX RETURN STATUS

(Check one of the boxes below)

- I **HAVE FILED** a **SEPARATE** 2013 Federal tax return  
Complete the IRS data retrieval tool or order a copy of the tax RETURN transcript and submit to the Financial Aid Office along with copies of ALL W-2 wage statements, and/or Schedule K-1 (form 1065, if applicable), and Schedule C from the federal tax return.

\_\_\_ Please check here if you have completed or plan to complete the IRS Data Retrieval Tool once your IRS tax return has been filed

- To complete the IRS data retrieval tool, go to [www.FAFSA.gov](http://www.FAFSA.gov), log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section at the top of the page. From there, follow the instructions to determine if the parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2013 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS data retrieval tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. Please view the instructional tutorial at [www.saintmarys.edu/verification-changes](http://www.saintmarys.edu/verification-changes) for further details regarding the IRS data retrieval process.

\_\_\_ Please check here if you are unable or choose not to complete the IRS Data Retrieval Tool, and you will instead submit a copy of the 2013 IRS tax RETURN transcript of the income tax return to the school

- To obtain an IRS tax RETURN transcript, go to [www.irs.gov](http://www.irs.gov) and click on the "Get transcript for my tax records" link, or call the IRS at 1-800-908-9946. Make sure you order the "IRS tax RETURN transcript" and **not** the "IRS tax ACCOUNT transcript." The spouse will need his Social Security number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2013 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers.

- I have an **EXTENSION** to file a 2013 Federal tax return. The extension expires: \_\_\_\_\_.  
**Submit a copy of tax extension Form 4868 along with a written and signed statement of estimated AGI (adjusted gross income) and copies of all W-2 wage statements and/or Schedule K-1 (form 1065) to the Financial Aid Office.**

*\*\*Note the financial aid file will remain incomplete until the IRS Data Retrieval Tool is completed or a copy of the tax return transcript, W-2 statements, and all required Schedules are submitted to the Financial Aid Office.*

- I **AM NOT FILING** a 2013 Federal tax return because I did not work during 2013, or
- I **AM NOT FILING** a 2013 Federal tax return because I worked in 2013 but was not required to file a tax return.  
**List your employers below whether or not you received W2 wages statements. If you did receive W2 wages statements, please forward copies of each to the Financial Aid Office.**

<u>Employer's Name</u>	<u>2013 Amount Earned</u>
	\$
	\$
	\$
	\$

**E. OTHER FINANCIAL INFORMATION: \*\*\*LEAVE NO ITEM SPACE BLANK\*\*\***

Please report **annual amounts** you received. **If an item does not apply to you, write 0 or N/A in those spaces.**

	STUDENT AND SPOUSE
Child support <u>PAID</u> to another household during 2013 (attach separate sheet if needed). Do not include support paid for children listed on section B on the first page of this form: Child _____ Age ____ Paid to _____ Child _____ Age ____ Paid to _____	\$
Child support you <u>RECEIVED</u> for all children. Do not include foster care or adoption payments.	\$
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based portions of fellowships and assistantships that were included in your <b>adjusted gross income</b> .	\$
Student grant/scholarship aid reported to the IRS in your <b>adjusted gross income</b> . Include AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	\$
Combat pay that was taxable and included in your <b>adjusted gross income</b>	\$
Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances	\$
Food and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)	\$
Housing allowance paid to members of (select one): ____ the military or ____ clergy (including cash payments and cash value of benefits) Do not include value of on-base housing	\$
Supplemental Nutrition Assistance Program or SNAP (formerly food stamps) benefits	\$
Untaxed Social Security benefits	\$
Other untaxed income not reported elsewhere (e.g., workers' compensation, disability, etc.) Do NOT include student aid, Workforce Investment Act educational benefits, non-tax filers' combat pay, or benefits from flexible spending arrangements, e.g., cafeteria plans.	\$
Money received or paid on your behalf (e.g., bills), not reported elsewhere on this form	\$

**F. SIGN THIS STATEMENT** (We must have **both** signatures.)

We certify that all of the information reported on this statement, and all other documents we have submitted in order to qualify for federal, state, and institutional financial assistance, is true and complete to the best of our knowledge.

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

Date \_\_\_\_\_

Spouse Signature \_\_\_\_\_

Date \_\_\_\_\_

**Do not mail this form to the US Department of Education.**

**Submit this form to:**

Saint Mary's College Financial Aid Office

141 Le Mans Hall

Notre Dame, IN 46556

Phone: (574) 284-4557

Toll Free: (866) 502-7788

Fax: (574) 284-4818

***You should make a copy of this form for your records***

**\*\*\*SAINT MARY'S COLLEGE VERIFICATION DEADLINE: May 15, 2014\*\*\***

\*If we do not receive this form, all W2 wage statements, all required Schedules and either your IRS data retrieval or IRS Tax Return Transcript by May 15<sup>th</sup>, your financial aid package will not be sent before tuition bills are emailed to students in July\*