2018-2019 Parent Tax Information Verification Form

*** TO BE COMPLETED ONLY BY THE PARENT(S) LISTED ON THE STUDENT’S FAFSA ***

This form is listed as a requirement because your parent(s) did not successfully use the IRS Data Retrieval Tool (DRT) on your 2018-2019 FAFSA. **We recommend your parent(s) return to your saved FAFSA and use the DRT and then notify our office in 2-3 business days after they do this.** If they are not able to use the DRT or did not file a 2016 tax return, have them to complete this worksheet and attach the necessary documentation. You may mail, upload using self-service banner, or submit these documents in person. Please do not email or fax.

Student Name:        LU Student ID:

PLEASE READ ALL INSTRUCTIONS CAREFULLY TO HELP PREVENT PROCESSING DELAYS FOR AWARDING!

Please make only one selection. Check which box below applies to you, the parent(s) and review the instructions provided if necessary. You must submit the required documentation along with this form. Incomplete documents will not be processed.

☐ The parent(s) filed a 2016 Tax Return

YOU MUST SUBMIT THE FOLLOWING DOCUMENTATION

- 2016 IRS Tax Return Transcript
- If married but a separate 2016 tax return was filed, you must submit a Tax Return Transcript for both you and your spouse.
- If an amended return was filed, please submit the signed 1040X and the 2016 IRS Tax Return Transcript (additional documents may be requested)

*Please Note: A Tax Return Transcript is not the same as Tax Return Forms 1040, 1040A, or 1040EZ. Please review page 3 for more information and options to get a Tax Return Transcript.*

☐ The parent(s) was NOT employed and had no income earned from work in 2016

I___________________________________________, solemnly affirm that I nor my spouse, if married, (Parent(s) Name), did NOT earn any income from work during the period of January 1, 2016 – December 31, 2016. I understand that willful falsification of information contained in this form can result in referral of the matter for investigation as well as adjustments and/or cancellation of the student’s financial aid award(s). I understand that all parties, student and parent(s), will be held personally responsible for all fines, fees, penalties and/or adjustments that may incur if I provide incorrect information.

YOU MUST SUBMIT THE FOLLOWING DOCUMENTATION

- “Verification of Non-Filing Letter(s)” from the IRS (Please see page 3)
The parent(s) was employed in 2016 but did NOT and was NOT required to file a 2016 tax return. List below the names of all employers and the amount earned from each employer in 2016.

**YOU MUST SUBMIT THE FOLLOWING DOCUMENTATION**
- Your 2016 W2 forms or the 2016 Wage and Income Transcript
- Verification of Non-Filing Letter from the IRS (Please see page 3)


<table>
<thead>
<tr>
<th>Parent(s) Name</th>
<th>Employer's Name</th>
<th>2016 Earnings</th>
<th>W-2 Attached</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Example)</td>
<td>(Ex.) ABCs Auto Body Shop</td>
<td>(Example) $7,000.00</td>
<td>YES</td>
</tr>
<tr>
<td>Joe Smith</td>
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<td>(Example)</td>
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<td>(Example)</td>
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</tbody>
</table>

**Total Income Earned in 2016**

Additional documents may be requested at a later time to resolve any conflicting tax and income information.

**Parent Certification and Signature – PLEASE SIGN AND DATE BELOW**

I certify that the information on this form is true and correct. **Please sign only with your original signature in ink.**

**WARNING:**
If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.
Obtain a Transcript or Verification of Non-Filing from the IRS

**Tax Return Transcript**

A Tax Return Transcript is not the same as your original tax return forms 1040, 1040A or 1040 EZ. It shows most line items including your **adjusted gross income (AGI)** from your original tax return as filed, along with any forms and schedules. It doesn’t show changes made after you filed your original return. This transcript is only available for the current tax year and returns processed during the prior three years. A tax return transcript usually meets the needs of lending institutions offering mortgages and student loans. **Note:** the secondary spouse on a joint return must use Get Transcript Online or Form 4506-T to request this transcript type. When using Get Transcript by Mail or phone, the primary taxpayer on the return must make the request.

**How can I request Tax Return Transcript?**

1. Visit [www.IRS.gov](http://www.IRS.gov) and use the Get Transcript Online Tool (You will have to create an account if you do not already have one.
2. Visit [www.IRS.gov](http://www.IRS.gov) and select Get Transcript by Mail
3. Fax or Mail IRS form 4506-T ([https://www.irs.gov/forms-pubs/about-form-4506t](https://www.irs.gov/forms-pubs/about-form-4506t)) to the IRS

**Wage and Income Transcript**

The Wage and Income Transcript shows data from information returns we receive such as Forms W-2, 1099, 1098 and Form 5498, IRA Contribution Information. Current tax year information may not be complete until July. This transcript is available for up to 10 prior years.

**How can I request a Wage and Income Transcript?**

1. Visit [www.IRS.gov](http://www.IRS.gov) and use the Get Transcript Online Tool (You will have to create an account if you do not already have one.
2. Fax or Mail IRS form 4506-T ([https://www.irs.gov/forms-pubs/about-form-4506t](https://www.irs.gov/forms-pubs/about-form-4506t)) to the IRS

**Verification of Non-filing Letter**

The Verification of Non-filing Letter provides proof that the IRS has no record of a filed Form 1040, 1040A or 1040EZ for the year you requested. It doesn't indicate whether you were required to file a return for that year. This letter is available after June 15 for the current tax year or anytime for the prior three tax years using Get Transcript Online or Form 4506-T. You must use Form 4506-T if you need a letter for tax years older than the prior three years.

**How can I request a Verification of Non-filing Letter?**

1. Visit [www.IRS.gov](http://www.IRS.gov) and use the Get Transcript Online Tool (You will have to create an account if you do not already have one.
2. Fax or Mail IRS form 4506-T ([https://www.irs.gov/forms-pubs/about-form-4506t](https://www.irs.gov/forms-pubs/about-form-4506t)) to the IRS

***Do NOT submit this page, for your information only***