



### Section C. Tax Filing Information

Please put a checkmark in the box below that explains your tax filing information and then one that explains your parent's tax filing information. **(A total of two boxes should be checked)**

Options	Student	Parent																		
1. I have filed a 2015 U.S. Income Tax Return and used or will use the IRS Data Retrieval Tool.  <b>Please Note:</b> If you and your spouse filed taxes separately or if your marital status has changed since your taxes were filed you are ineligible to utilize the IRS Data Retrieval Tool and are both required to submit copies of your 2015 Federal Tax Return Transcripts and 2015 W2s.	<input type="checkbox"/>	<input type="checkbox"/>																		
2. I am submitting my 2015 Tax Return Transcript along with a copy of my 2015 W2s because I am unable or choosing not to use the IRS Data Retrieval Tool. My Tax Return Transcript and 2015 W2s are attached. I understand additional documentation may be requested from me.	<input type="checkbox"/>	<input type="checkbox"/>																		
3. I have not yet filed my taxes for 2015. I have been granted a filing extension for 2015 by the IRS. I have attached the following documentation: <ul style="list-style-type: none"> <li>✓ Copy of IRS Form 4868</li> <li>✓ Copy of 2015 W2s</li> </ul> <b>-OR- (if no W2s)</b> <ul style="list-style-type: none"> <li>✓ If self-employed certify below the amount of your Adjusted Gross Income and U.S. Income Tax Paid for tax year 2015.                Adjusted Gross Income \$ _____                Income Tax Paid \$ _____</li> </ul> I understand the attached documents will be used to preliminarily complete the verification process. Once my 2015 taxes are processed by the IRS I will utilize the IRS Data Retrieval Tool or submit a copy of my 2015 Tax Return Transcript so that my financial aid eligibility can be reviewed and finalized.	<input type="checkbox"/>	<input type="checkbox"/>																		
4. I filed an amended IRS income tax return for the 2015 tax year. I have attached the following documentation: <ul style="list-style-type: none"> <li>✓ Copy of my 2015 IRS Tax Return Transcript</li> <li>✓ Copy of 2015 W2s</li> <li>✓ Copy of my <b>signed</b> 2015 IRS Form 1040X "Amended U.S. Individual Income Tax Return" that was filed with the IRS</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>																		
5. I worked during 2015, but have not filed and am not required to file a 2015 federal tax return. Attached is my 2015 IRS Verification of Non-Filing Letter showing that I did not file a 2015 Federal Tax Return. Below is the list of all my 2015 employers and the amounts I earned in 2015. (Use extra paper if necessary.)	<input type="checkbox"/>	<input type="checkbox"/>																		
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 45%;">Employer's Name</th> <th style="width: 20%;">IRS W-2 Provided <i>(All copies of W2(s) issued must be attached)</i></th> <th style="width: 35%;">Annual Amount Earned in 2015</th> </tr> </thead> <tbody> <tr> <td> </td> <td style="text-align: center;"><input type="checkbox"/> Yes <input type="checkbox"/> No</td> <td style="text-align: center;">\$</td> </tr> <tr> <td> </td> <td style="text-align: center;"><input type="checkbox"/> Yes <input type="checkbox"/> No</td> <td style="text-align: center;">\$</td> </tr> <tr> <td> </td> <td style="text-align: center;"><input type="checkbox"/> Yes <input type="checkbox"/> No</td> <td style="text-align: center;">\$</td> </tr> <tr> <td> </td> <td style="text-align: center;"><input type="checkbox"/> Yes <input type="checkbox"/> No</td> <td style="text-align: center;">\$</td> </tr> <tr> <td colspan="2" style="text-align: right;"><b>Total Amount of Income Earned From Work</b></td> <td style="text-align: center;">\$</td> </tr> </tbody> </table> <p><i>*All copies of W2(s) issued must be attached.</i></p>	Employer's Name	IRS W-2 Provided <i>(All copies of W2(s) issued must be attached)</i>	Annual Amount Earned in 2015		<input type="checkbox"/> Yes <input type="checkbox"/> No	\$		<input type="checkbox"/> Yes <input type="checkbox"/> No	\$		<input type="checkbox"/> Yes <input type="checkbox"/> No	\$		<input type="checkbox"/> Yes <input type="checkbox"/> No	\$	<b>Total Amount of Income Earned From Work</b>		\$	<input type="checkbox"/>	<input type="checkbox"/>
Employer's Name	IRS W-2 Provided <i>(All copies of W2(s) issued must be attached)</i>	Annual Amount Earned in 2015																		
	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$																		
	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$																		
	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$																		
	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$																		
<b>Total Amount of Income Earned From Work</b>		\$																		
6. I was not employed and had no income earned from work in 2015. Attached is my 2015 IRS Verification of Non-Filing Letter showing that I did not file a 2015 Federal Tax Return.	<input type="checkbox"/>	<input type="checkbox"/>																		

### Section D. Certification Statement

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct.

STUDENT NAME (Printed)	Student ID#
STUDENT SIGNATURE	Date
PARENT SIGNATURE (Required)	Date

**Warning:** If you purposely give false or misleading information on this worksheet you may be fined, sentenced to prison, or both.

Return this form and any attachments to:  
**Simpson University, Student Financial Services**  
 2211 College View Dr, Redding, CA 96003  
 (530) 226-4621; FAX (530) 226-4855  
 financialaid@simpsonu.edu