

Tax Filing Information

Please put a checkmark in **ONE** box below that explains your (and your spouse's, if married) tax filing information.

Options	Student	Spouse																
<p>1. Preferred: I filed a 2015 tax return. I <u>used or will use</u> the IRS Data Retrieval Tool (IRS DRT) to electronically load my federal tax data into my FAFSA (log in to your FAFSA at www.fafsa.ed.gov to use this option). I understand that if I change tax data elements on my FAFSA after using the IRS data retrieval I will need to submit additional information to the financial aid office.</p> <p>Please Note: 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.</p>	<input type="checkbox"/>	<input type="checkbox"/>																
<p>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.</p>	<input type="checkbox"/>	<input type="checkbox"/>																
<p>3. I will request a 2015 Tax Return Transcript from the IRS (visit www.irs.gov or call 1-800-908-9946 to request your transcript). I have attached a copy of my 2015 W2s. I understand once I have submitted my tax transcript that additional documentation may be requested from me.</p>	<input type="checkbox"/>	<input type="checkbox"/>																
<p>4. I filed a tax extension for the 2015 tax year. Attached is a copy of my IRS Form 4868. Also attached are all copies of my 2015 W2s and a signed, written statement estimating my 2015 Adjusted Gross Income and 2015 taxes. 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.</p>	<input type="checkbox"/>	<input type="checkbox"/>																
<p>5. I filed an amended IRS income tax return for the 2015 tax year. Attached is a copy of my 2015 IRS Tax Return Transcript and 2015 w2s. Also attached is a signed copy of the 2015 IRS form 1040X "Amended U.S. Individual Income Tax Return" that was filed with the IRS.</p>	<input type="checkbox"/>	<input type="checkbox"/>																
<p>6. I am submitting W2s only. I received W2s during 2015 but have not filed and am not required to file a 2015 federal tax return. Note: We may require you to provide documentation from the IRS that indicates a 2015 IRS income tax return was not filed with the IRS.</p>	<input type="checkbox"/>	<input type="checkbox"/>																
<p>7. I was not employed and had no income earned from work in 2015. Note: We may require you to provide documentation from the IRS that indicates a 2015 IRS income tax return was not filed with the IRS.</p>	<input type="checkbox"/>	<input type="checkbox"/>																
<p>8. I do not have W2s. I did not receive W2s and did not (and will not) complete a 2015 federal tax return. Difficulty locating my W2s does not constitute an acceptable reason to not submit them. Below are the sources and amounts of my 2015 income and an explanation why I am unable to provide my W2s. This may include foreign income. (Use extra paper if necessary). If you did not work and had no income from work in 2015 please check box 7. Note: We may require you to provide documentation from the IRS that indicates a 2015 IRS income tax return was not filed with the IRS.</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid black;"><i>Source of Income</i></th> <th style="text-align: left; border-bottom: 1px solid black;"><i>Amount Earned in 2015</i></th> <th style="text-align: left; border-bottom: 1px solid black;"><i>Income Recipient</i></th> <th style="text-align: left; border-bottom: 1px solid black;"><i>Explanation</i></th> </tr> </thead> <tbody> <tr> <td style="border-bottom: 1px solid black;">_____</td> <td style="border-bottom: 1px solid black;">_____</td> <td style="border-bottom: 1px solid black;">_____</td> <td style="border-bottom: 1px solid black;">_____</td> </tr> <tr> <td style="border-bottom: 1px solid black;">_____</td> <td style="border-bottom: 1px solid black;">_____</td> <td style="border-bottom: 1px solid black;">_____</td> <td style="border-bottom: 1px solid black;">_____</td> </tr> <tr> <td style="border-bottom: 1px solid black;">_____</td> <td style="border-bottom: 1px solid black;">_____</td> <td style="border-bottom: 1px solid black;">_____</td> <td style="border-bottom: 1px solid black;">_____</td> </tr> </tbody> </table>	<i>Source of Income</i>	<i>Amount Earned in 2015</i>	<i>Income Recipient</i>	<i>Explanation</i>	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
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_____	_____	_____	_____															
_____	_____	_____	_____															
_____	_____	_____	_____															

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

SPOUSE SIGNATURE (Optional) Date

Warning: If you purposely give false or misleading information on this worksheet you may be fined, sentenced to jail, 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