

2017-2018**Marital Status/Tax Filing Worksheet for Parents
Instruction Sheet**

The information you provide will be compared to the Free Application for Federal Student Aid (FAFSA). If there are differences, our office will submit corrections to your student's FAFSA electronically. This instruction sheet is for you to keep for your records.

In the first section of this form, you (the parent) will confirm your marital status and the date this status became effective.

In the next section of the form, you will clarify your tax filing status. The only documentation that we are able to accept is a **signed federal tax return transcript**. Please **do not** send a copy of your federal tax return (1040, 1040A, or 1040EZ) as this is no longer acceptable documentation. The remainder of the form collects and clarifies federal tax return information.

Below are a couple of options for requesting a transcript. It may take up to two weeks for IRS income information to be available for electronic IRS tax return filers and six to eight weeks for paper IRS tax return filers.

IRS Online Tax Return Transcript Request: <http://www.irs.gov/Individuals/Get-Transcript>

IRS Automated Phone Transcript Service: **1-800-908-9946**

If the parent is not required by law to file a federal tax return you will need to provide the following:

1. A copy of IRS Form W-2 for each source of 2015 employment income received (or an equivalent document such as the Wage and Income Transcript) Wage and Income Transcripts can be obtained at www.irs.gov/individuals/get-transcript; **and**
2. IRS Verification of Non-filing Letter dated on or after October 1, 2016.

An IRS Verification of Non-filing Letter can be obtained online using the **IRS Get Transcript service**. If the individual cannot obtain one online for whatever reason, it must be obtained by completing and checking box 7 on the **IRS Form 4506-T, Request for Transcript of Tax Return**, and mailing it to the IRS. If appropriate, a similar confirmation from another taxing authority (e.g., a U.S. territory or a foreign government) is also acceptable

(Please Note: Email is not always a secure method of communication and may inadvertently expose your information if misdirected. Virginia Tech suggests using fax, U.S. Postal Service or personal delivery as a more secure method of delivery. If you choose to submit information through email, Virginia Tech will not be responsible for any exposure of data.)

**2017-2018
Marital Status/Tax Filing Worksheet for Parent(s)**

Student ID Number: _____ Email: _____

Student's Full Legal Name: _____
(Please print clearly) Last First Middle

Parent's Name: _____
Last First

Current marital status of your supporting parent: Married/Remarried Separated Divorced Widowed Effective date of status change _____ / _____
month year

Please check the statement below that applies to you:

- I, the supporting parent, filed my 2015 taxes with a status **other than married filing joint**. Please skip the remaining questions below, **sign** the 2nd page of this form, and return it along with a signed copy of your 2015 IRS Tax Return Transcript.
- I, the supporting parent, filed my 2015 taxes with a filing status of **married filing joint**. Please complete all sections, sign, and return this entire form along with a signed copy of your 2015 IRS Tax Return Transcript and all 2015 W2s.
- I, the supporting parent, **have not and will not file a tax return** for 2015. Note: For those who are will not or are not required to file federal income tax you will be required to provide a Non-Filers letter from the IRS. This can be requested <https://www.irs.gov/individuals/get-transcript>

Please complete this section **only** if the supporting parents' marital status is something **other than married** and you filed a federal tax return for 2015 with the status of married filing jointly.

Tax Return Item Income Section	1040 Line Number	1040A Line Number	Amount Attributed to Supporting Parent
Wages, Salaries, Tips (found on W2 form)	7	7	\$
Interest Income	8a	8a	\$
Dividends	9a	9a	\$
Taxable Refunds, Credits, or Offsets	10	XXXXXXXXXX	\$
Alimony Received	11	XXXXXXXXXX	\$
Business Income/Loss	12	XXXXXXXXXX	\$
Capital Gain/Loss	13	10	\$
Other Gains	14	XXXXXXXXXX	\$
IRA Distributions	15b	11b	\$
Total Pensions and Annuities	16b	12b	\$
Rents, Royalties, Partnerships	17	XXXXXXXXXX	\$
Farm Income/Loss	18	XXXXXXXXXX	\$
Unemployment Compensation	19	13	\$
Social Security Benefits	20b	14b	\$
Other Income	21	XXXXXXXXXX	\$

Student ID Number _____

Student Last Name _____

Tax Return Item Adjusted Gross Income Section	1040 Line Number	1040A Line Number	Amount Attributed to Supporting Parent
Educator Expense	23	16	\$
Business Expenses	24	XXXXXXXXXX	\$
Health Savings Account Deduction	25	XXXXXXXXXX	\$
Moving Expenses	26	XXXXXXXXXX	\$
Deductible part of Self Employment Tax	27	XXXXXXXXXX	\$
Self-Employed SEP, SIMPLE plans	28	XXXXXXXXXX	\$
Self-Employed Health Insurance Plans	29	XXXXXXXXXX	\$
Penalty on Early Withdrawal of Savings	30	XXXXXXXXXX	\$
Alimony Paid	31a	XXXXXXXXXX	\$
IRA Deduction	32	17	\$
Student Loan Interest Deduction	33	18	\$
Tuition and Fees	34	19	\$
Domestic Production Activities	35	XXXXXXXXXX	\$

Tax, Credits, and Payments	1040 Line Number	1040A Line Number	Amount Attributed to Supporting Parent
Education Credits from Form 8863, Line 19	50	33	\$

Asset Information (as of the date you filed the FAFSA)	Parent Amount (whole dollars only)	Student Amount (whole dollars only)
Balance of Cash, Savings, and Checking	\$	\$
Net worth of Investments (<i>Value minus debt = current net worth</i>)	\$	\$
Net worth of Business and/or Farm (<i>Value minus debt = current net worth</i>)	\$	\$

Additional Comments (optional): (please use this space to provide any explanation of the figures provided above)

If I purposely give false or misleading information on this worksheet, I may receive a fine, a prison sentence, or both. By signing this information request, I am certifying that all information is complete and correct.

Parent Signature _____ **Date** _____
Electronic signature is not allowed

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