

## 2017-2018 Marital Status/Tax Filing Worksheet for Students 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 FAFSA electronically. This instruction sheet is for you to keep for your records.

In the first section of this form, you (the student) 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 you and or your spouse (if applicable) are **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](http://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.)*



Student ID Number \_\_\_\_\_

Student Last Name \_\_\_\_\_

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

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

Asset Information (as of the date you filed the FAFSA)	Student Amount (whole dollars only)	Spouse (if applicable) (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.

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

Date \_\_\_\_\_

Electronic signature is not allowed

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