

STEP 3 – STUDENT TAX & INCOME INFORMATION – CALENDAR YEAR 2015

Did you, the student, have earnings from a Co-op in 2015? Yes No

Check the appropriate box below and provide the requested information and/or documents:

- I used the IRS Data Retrieval Tool to transfer my 2015 income tax return information to the FAFSA and made no further changes to the information.
- I did not (or could not) transfer my 2015 income tax return information to the FAFSA using the IRS Data Retrieval. I will provide a copy of my 2015 IRS Tax Return Transcript. *(Only use if the IRS Data Retrieval failed to load properly).*

This can be obtained by mail from the IRS using Form 4506-T and completing line 6 and checking box 6a. It may also be requested online at irs.gov using "Get Transcript" and selecting transcript type: "Return Transcript".

____ Check here if Tax Return Transcript is attached.

____ Check here if Tax Return Transcript will be provided later. *(Typically requires 2 weeks or less).*

- I was not employed and did not have income earned from work in 2015.
- I was employed, but not required to file a 2015 Federal Income Tax Return (two items required).

1) Complete the chart below to list the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is provided. List every employer even if the employer did not issue an IRS W-2 form.

Fill out the below chart only if you did <u>not</u> file taxes, but <u>had</u> earned income from work		
Employer's Name	2015 Amount Earned	IRS W-2 Attached?
<i>(example) Suzy's Auto Body Shop</i>	<i>\$2,000.00</i>	<i>Yes</i>
Total Amount of Income Earned from Work		

2) Provide documentation from the IRS that indicates a 2015 IRS income tax return was not filed.

This documentation from the IRS or other relevant tax authority must be dated on or after October 1, 2016 and indicate a 2015 IRS income tax return was not filed with the IRS or other relevant tax authority (e.g., a US territory or foreign government). This can be obtained by mail from the IRS using Form 4506-T and checking box 7.

____ Check here if Confirmation of Non-filing is attached.

____ Check here if Confirmation of Non-filing will be provided later. *(Typically requires 2 weeks or less).*

STEP 4 – SPOUSE OR PARENT TAX & INCOME INFORMATION – CALENDAR YEAR 2015

Check the appropriate box below and provide the requested information and documents:

- My spouse/parent(s) used the IRS Data Retrieval Tool to transfer the 2015 income tax return information to the FAFSA and made no further changes to the information.

Important Note: *If the spouse/parents filed separate 2015 IRS income tax returns, the IRS Data Retrieval Tool cannot be used and the 2015 IRS Tax Return Transcript(s) must be provided for each person separately (see next option).*

More options continued on next page

STEP 4 CONTINUED – SPOUSE OR PARENT TAX & INCOME INFO–CALENDAR YEAR 2015

- My spouse/parent(s) did not (or could not) transfer the 2015 income tax return information to the FAFSA using the IRS Data Retrieval. I will provide a copy of the 2015 IRS Tax Return Transcript(s). (*Only use if the IRS Data Retrieval failed to load properly*).

This can be obtained by mail from the IRS using Form 4506-T and completing line 6 and checking box 6a. It may also be requested online at irs.gov using "Get Transcript" and selecting transcript type: "Return Transcript".

- _____ Check here if Tax Return Transcript(s) is attached.
- _____ Check here if Tax Return Transcript(s) will be provided later. (*Typically requires 2 weeks or less*).

- My spouse/parent(s) were not employed and did not have income earned from work in 2015.
- My spouse/parent(s) were employed, but not required to file a 2015 Federal Income Tax Return (two items required).
 - 1) Complete the chart below to list the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is provided. List every employer even if the employer did not issue an IRS W-2 form.

Fill out the below chart only if you did <u>not</u> file taxes, but <u>had</u> earned income from work		
Employer's Name	2015 Amount Earned	IRS W-2 Attached?
<i>(example) Suzy's Auto Body Shop</i>	<i>\$2,000.00</i>	<i>Yes</i>
Total Amount of Income Earned from Work		

- 2) Provide documentation from the IRS that indicates a 2015 IRS income tax return was not filed. This documentation from the IRS or other relevant tax authority must be dated on or after October 1, 2016 and indicate a 2015 IRS income tax return was not filed with the IRS or other relevant tax authority (e.g., a US territory or foreign government). This can be obtained by mail from the IRS using Form 4506-T and checking box 7.

- _____ Check here if Confirmation of Non-filing is attached.
- _____ Check here if Confirmation of Non-filing will be provided later. (*Typically requires 2 weeks or less*).

STEP 5 – CERTIFICATION

Each person signing this form certifies that all the information reported on it is complete and correct.

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

<i>Student Signature</i>	<i>Date</i>	<i>Student Name</i>
<i>Parent Signature (If student is dependent)</i>	<i>Date</i>	<i>Parent Name (If student is dependent)</i>
<i>Spouse Signature (If student is married)</i>		<i>Spouse Name (If student is married)</i>

Questions?

Trine University Financial Aid Office 1 University Ave Angola, IN 46703	Main Campus 800.347.4878 option 3 260.665.4511 fax finaid@trine.edu	CGPS 877.294.4878 260.665.4511 fax spsfinaid@trine.edu
---	---	---