

Student's name \_\_\_\_\_

Valpo ID # \_\_\_\_\_

**Student's Tax Filing Status - Tax Year 2018**

Did you file or were you required to file a 2018 U.S. Federal Income Tax Return?

- Yes.** Please select one of the following statements:
- I have used the IRS Data Retrieval Tool to transfer my 2018 IRS income information into my FAFSA
  - IRS Data Retrieval Tools was not used
    - Attached is a signed copy of my 2018 **IRS Tax Return Transcript \*\***
  - No, I had no earnings** from work
  - No, but I had some earnings** from work. **(Provide/check all that apply):**
    - I have provided the **Student Non-Filer's Statement Form** (found on our website)
    - I have attached a copy my 2018 **W2 forms**
    - I have attached a copy of my 2018 **1099 MISC income**
    - I am **self-employed** and have attached a copy of my **Schedule C** from the 2018 taxes showing business income
    - Attached is a copy of **Form 4835**– Farm income

**Parent (s) Tax Filing Status - Tax Year 2018 - Please check all applicable boxes.**

Did your parent(s) file or were they required to file a 2018 U.S. Federal Income Tax Return?

- Yes,** and their tax filing status was:
- Married, Filing Jointly     Married, Filing Separately\*     Head of Household     Single     Widowed
  - The IRS Data Retrieval Tool in FAFSA was used to transfer their 2018 IRS income information.
  - IRS Data Retrieval Tool was **NOT** used.
    - Attached is a signed copy of their 2018 **IRS Federal Tax Return Transcript.\*\***

Parent One Name: \_\_\_\_\_

Parent Two Name: \_\_\_\_\_

- No, they did not file.** Please indicate why.
- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Parent <b>One</b> had <b>no earnings</b> from work</li> <li><input type="checkbox"/> I have provided/requested the <b>Verification of Non-Filing Letter</b> from the IRS***</li> <li><input type="checkbox"/> Parent <b>One</b> had <b>some earnings</b> from work. <b>(Provide/check all that apply):</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> I have provided/requested the <b>Verification of Non-Filing Letter</b> from the IRS***</li> <li><input type="checkbox"/> I have provided a copy of their <b>2018 W2 forms</b></li> <li><input type="checkbox"/> I have provided a copy of their <b>1099 MISC</b></li> <li><input type="checkbox"/> I have provided a copy of their <b>2018 Schedule C</b> showing business income <b>(if self-employed)</b></li> <li><input type="checkbox"/> I have provided a copy of their <b>Form 4835</b> (if they had farm income)</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Parent <b>Two</b> had <b>no earnings</b> from work</li> <li><input type="checkbox"/> I have provided/requested the <b>Verification of Non-Filing Letter</b> from the IRS***</li> <li><input type="checkbox"/> Parent <b>Two</b> had <b>some earnings</b> from work. <b>(Provide/check all that apply):</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> I have provided/requested the <b>Verification of Non-Filing Letter</b> from the IRS***</li> <li><input type="checkbox"/> I have provided a copy of their <b>2018 W2 forms</b></li> <li><input type="checkbox"/> I have provided a copy of their <b>1099 MISC</b></li> <li><input type="checkbox"/> I have provided a copy of their <b>2018 Schedule C</b> showing business income <b>(if self- employed)</b></li> <li><input type="checkbox"/> I have provided a copy of their <b>Form 4835</b> (if they had farm income)</li> </ul> </li> </ul> |
|--|---|

\*A tax return transcript from both parents will be required.

\*\*A guide for getting your Tax Return Transcript is on valpo.edu/student-financial-services under the **FORMS** link.

\*\*\*If your parent(s) did not file taxes and were not required to file, we will need a copy of their 2018 **Verification of Non-Filing Letter** from IRS.gov. To receive this document you need to complete the **4506-T** form which you can download from the IRS.gov site.

### Other Income Information - Tax Year 2018

Please report all applicable income information for the student and parent(s) below for the 2018 tax year.  
**Please indicate \$0 in any field that does not apply.**

Student	Income Resources for 2018	Parent (s)
\$ X X X	Child support <b>RECEIVED</b> for all children (including the student) in 2018. Do not include foster care or adoption payments.	\$
\$	Untaxed Income <ul style="list-style-type: none"> <li>• Workers compensation</li> <li>• Disability benefits</li> <li>• Untaxed foreign income</li> <li>• The untaxed portions of health savings accounts (IRS Form 1040 Schedule 1 — line 25)</li> </ul>	\$
\$ X X X	Housing, food and other living allowance paid to: ( <b>select all that apply</b> ): <input type="checkbox"/> <b>Clergy</b> <input type="checkbox"/> <b>Military</b> (including cash payments and cash value of benefits). Do not include value of on-base housing or basic military allowance/parsonage value.	\$
\$	Veteran's Non-Educational Benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational work-study allowances.	\$
\$	Welfare/TANF/SNAP/Food Stamps	\$
\$	Taxable Income from: Federal Work Study, Co-Op Earnings, Fellowships, Combat Pay, AmeriCorps benefits, grants/scholarships over tuition, fees, books (circle those that apply.)	\$
\$	Money Received or paid on your behalf (e.g. bills) by a person not reported on this form. <b>Do include</b> distributions <b>to the student</b> from a 529 plan that is owned by someone other than you or your parents (such as grandparents, aunts, and uncles. (You must include these distribution amounts.) <b>Do not</b> include Social Security benefits.	\$  X X X
<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	IRA/Pension distributions: If you have a difference between lines 4a minus 4b from the IRS form 1040, was this amount a rollover?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A

### Certification and Signatures

I certify that all the information reported on this worksheet is complete and correct. The student and student's parent must sign this worksheet. **Electronic signatures are not accepted.**

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

Parent Signature \_\_\_\_\_ Date \_\_\_\_\_

Return completed forms to: Office of Financial Aid - Kretzmann Hall, Valparaiso University  
 1700 Chapel Drive, Valparaiso IN 46383  
 Fax: 219-464-5012 Phone: 219-464-5015 Email: [finaid@valpo.edu](mailto:finaid@valpo.edu)