

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** and my tax filing status was:
- Married, Filing Jointly     Married, Filing Separately\*     Head of Household     Single     Widowed
  - I have used the IRS Data Retrieval Tool to transfer my 2018 IRS income into my FAFSA
  - IRS Data Retrieval Tool was **NOT** used
    - Attached is a signed copy of my 2018 **IRS Federal Tax Return Transcript\*\***
- No**, I had **no earnings** from work
- I have provided/requested the **Verification of Non-Filing Letter** from the IRS\*\*\*
- No**, but I had **some earnings** from work. **(Provide/check all that apply):**
- I have provided/requested the **Verification of Non-Filing Letter** from the IRS\*\*\*
  - I have attached a copy my 2018 **W2 form(s)**
  - I have attached a copy of my 2018 **1099 MISC**
  - I am **self-employed**. I have attached a copy of **Schedule C** from my 2018 taxes for my business income
  - I have attached a copy of **Form 4835**– Farm income

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

Did your spouse 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 the 2018 IRS income information into the FAFSA
  - IRS Data Retrieval Tool was **NOT** used
    - Attached is a signed copy of their 2018 **IRS Federal Tax Return Transcript\*\***
- No**, my spouse had **no earnings** from work.
- I have provided/requested the **Verification of Non-Filing Letter** from the IRS\*\*\*
- No**, but my spouse had **some earnings** from work. **(Provide/check all that apply):**
- Attached is a copy of my spouse's 2018 **Verification of Non-Filing Letter** from IRS.\*\*\*
  - Attached is a copy of my spouse's 2018 **W2 forms()**
  - Attached is a copy of my spouse's 2018 **1099 MISC income**
  - My spouse is **self-employed**. I have attached a copy of **Schedule C** from our/their 2018 taxes for their business income
  - Attached is a copy of **Form 4835**– Farm income

\*A tax return transcript must be provided for both the student and the spouse.

\*\* A guide for getting your Tax Transcript is on [valpo.edu/student-financial-services](http://valpo.edu/student-financial-services) under the **FORMS** link.

\*\*\*If you or your spouse did not file taxes and were not required to file, please send in a **2018 Verification of Non-Filing Letter** from IRS.gov. To receive the document you must complete the **4506-T** form which can be downloaded from the IRS.gov site.

### Other Income Information - Tax Year 2018

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

Student	Income Resources for 2018	Spouse
\$	Child support <b>RECEIVED</b> for all children 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>	\$
\$	Housing, food and other living allowance paid to: ( <b>select all that apply</b> ): <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Clergy</b></li> <li><input type="checkbox"/> <b>Military</b> (including cash payments and cash value of benefits).</li> </ul> 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.	\$
<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.

**Electronic signatures are not accepted.**

Student 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)