

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

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

**Student's Tax Filing Status - Tax Year 2019**

Did you file or were you required to file a 2019 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 2019 IRS income information to my FAFSA and have provided a copy of my **2019 W2**.
- IRS Data Retrieval Tools was **NOT** used
  - Attached is a signed copy of my 2019 **Federal Tax Return or IRS Tax Return Transcript\*** along with a copy of my **2019 W2**.

**No**, I had **no earnings** from work

**No**, but I had **some earnings** from work but was not required to file. **(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 2019 **W2 forms**

**Parent(s) Tax Filing Status - Tax Year 2019 - Please check all applicable boxes.**

**(Parents are the biological or adoptive parent you currently live with and their spouse)**

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

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

Did your parent(s) file or were they required to file a 2019 U.S. Federal Income Tax Return?

**Yes:**

- The IRS Data Retrieval Tool in FAFSA was used to transfer their 2019 IRS income information to the FAFSA and attached are their **2019 W2(s)**, or if self-employed, a copy of their **Schedule C**.
- IRS Data Retrieval Tool was **NOT** used.
  - Attached is a signed copy of their **2019 Federal Tax Return or IRS Tax Return Transcript\*** along with their **2019 W2(s)**, or if self-employed, a copy of their **Schedule C**.

**No, they did not file.** Please indicate why:

Parent **One** had no earnings from work, attached is the **Verification of Non-Filing Letter\*\*** from the IRS

Parent **One** had some earning from work , but not enough to file.

**No, they did not file.** Please indicate why:

Parent **Two** had no earnings from work, attached is the **Verification of Non-Filing Letter\*\*** from the IRS

Parent **Two** had some earning from work , but not enough to file.

**(Provide/check all that apply):**

- I have provided a copy of their **2019 W2 forms**
- I have provided a copy of their **1099 MISC form(s)**

**(Provide/check all that apply):**

- I have provided a copy of their **2019 W2 forms**
- I have provided a copy of their **1099 MISC form(s)**

- A guide for getting your **Tax Return Transcript** is on [valpo.edu/student-financial-services](http://valpo.edu/student-financial-services) under **FORMS**.
- **If parents filed separately, a signed Federal Tax Return or Tax Return Transcript from both parents will be required.**

**\*\*If your parent(s) did not file taxes and were not required to file, we will need a copy of their 2019 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 2019**

Please report all applicable income information for the student and parent(s) below for the 2019 tax year.  
**Please indicate \$0 in any field that does not apply.**

Student	Income Resources for 2019	Parent (s)
\$ X X X	Child support <b>RECEIVED</b> for all children (including the student) in 2019. 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 12)</li> </ul>	\$
\$ X X X	Housing, food and other living allowance paid to parent: <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 distributions 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 OR 4c minus 4d 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)