

Student's name _____

Valpo ID # _____

Student's Tax Filing Status - Tax Year 2020

Did you file or were you required to file a 2020 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 2020 IRS income information to my FAFSA and have provided a copy of my **2020 W2**.
 - IRS Data Retrieval Tools was **NOT** used
 - Attached is a signed copy of my 2020 **Federal Tax Return or IRS Tax Return Transcript*** along with a copy of my **2020 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 2020 **W2 forms**
 - I have attached a copy of my 2020 **1099 MISC income**

Parent(s) Tax Filing Status - Tax Year 2020 - 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 2020 U.S. Federal Income Tax Return?

- Yes:**
 - The IRS Data Retrieval Tool in FAFSA was used to transfer their 2020 IRS income information to the FAFSA and attached are their **2020 W2(s)**. If **self-employed**, attached are all **Schedules** from the federal tax return.
 - IRS Data Retrieval Tool was **NOT** used.
 - Attached is a signed copy of their **2020 Federal Tax Return or IRS Tax Return Transcript*** along with their **2020 W2(s)**. If **self-employed**, attached are all **Schedules** from the federal tax return.

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.

(Provide/check all that apply):

- I have provided a copy of their **2020 W2 forms**
- I have provided a copy of their **1099 MISC form(s)**
- I have attached all **Schedules** from the tax return

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 **2020 W2 forms**
- I have provided a copy of their **1099 MISC form(s)**
- I have attached all **Schedules** from the tax return

- **If parents filed separately, a signed Federal Tax Return or Tax Return Transcript from both parents will be required.**
- **A Tax Return Transcript can be secured through IRS.GOV.**

If your parent(s) did not file taxes and were not required to file, we will need a copy of their 2020 **Verification of Non-Filing Letter from IRS.gov. To receive this document you need click on Get Your Tax Record and then click on Get Transcript Online.

Other Income Information - Tax Year 2020

Please report all applicable income information for the student and parent(s) below for the 2020 tax year.
Please indicate \$0 in any field that does not apply.

Student	Income Resources for 2020	Parent (s)
\$ X X X	Child support RECEIVED for all children (including the student) in 2020. Do not include foster care or adoption payments.	\$
\$	Untaxed Income <ul style="list-style-type: none"> • Workers compensation • Disability benefits • Untaxed foreign income • The untaxed portions of health savings accounts (IRS Form 1040 Schedule 1 — line 12) 	\$
\$ X X X	Housing, food and other living allowance paid to parent: (select all that apply): <ul style="list-style-type: none"> <input type="checkbox"/> Clergy <input type="checkbox"/> Military (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. Do include distributions to the student 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.) Do not 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